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# Sopheon Accolade<sup>®</sup>

Administrator's Guide

Version: 17.0



## About Sopheon Accolade®

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## About this Guide

This guide describes how to perform Accolade's initial setup and configuration tasks, and explains how to maintain Accolade to provide the continually changing data needed for excellent product innovation and development.

You must have the Administrator user role in Accolade to perform most of the tasks in this guide.

## Who Should Read This Guide

You should read this guide if you are setting up, configuring, or administering Accolade. This guide assumes you are familiar with:

- Accolade, its concepts and general navigation
- Microsoft Windows procedures and user interface (UI)
- Web site administration
- Database administration
- Security administration

## Contents of This Guide

This guide describes how to configure and administer Accolade. It is divided into the following chapters:

- [Chapter 1](#) - Describes how to create user accounts for access to Accolade and the various user roles, how to design access groups for project accessibility, and how to use security lists and security profiles to further refine user access.
- [Chapter 2](#) - Describes how to define the components used to enter and gather data for Accolade projects including metrics, matrices, quick grids, document templates, reports, and taking portfolio snap shots.
- [Chapter 3](#) - Describes how to setup additional components for the process flows in your organization including classes, workflows, and reference tables. These components are part of process models that Process Designers within your organization define.
- [Chapter 4](#) - Describes how to setup reports and charts for viewing Accolade data.
- [Chapter 5](#) - Describes how to configure the Accolade web site including replacing logos and other graphics, replacing and translating terminology, creating resource pools, adding menus, defining currencies, and setting up Time Tracking.
- [Chapter 6](#) - Describes how to integrate Accolade with other applications, such as MS Office applications.
- [Chapter 7](#) - Provides information about how to import project, metric, and resource data into Accolade using specially formatted reference table.
- [Chapter 8](#) - Provides information about backing up the databases associated with Accolade.
- [Appendix A](#) - Provides a list of the standard database views and their fields available for reports based on queries, and describes how to create custom reporting views.
- [Appendix B](#) - Provides a list of the columns available for creating reports using Accolade Online Reporting and Accolade Office Extensions.

- [Appendix C](#) - Provides a list of the Accolade system-level parameters that are managed using the Accolade Administration Console.
- [Appendix D](#) - Provides details about the XML structure and elements used to create online forms.
- [Appendix E](#) - Provides details about adding database queries to Accolade for use in reports and query-based metrics, and provides a list of query field codes.
- [Appendix F](#) - Provides a list of the Accolade field codes available for use in Smart templates.

## 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 - Online Form Example<version>.xml
- [Blue text](#) indicates a cross-reference link that you can click to take you to that location.

## Icon Conventions



- Indicates a section with Sopheon best practices for system setup.



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



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

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

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## Chapter 1

# Managing Access to Accolade

This project describes how to setup project security using access groups, security lists, and security profiles and how to define user accounts for user who require access to the application. See the following sections:

- [Before You Begin](#)
- [Access Groups](#)
- [Security Lists](#)
- [Security Profiles](#)
- [Accolade Users and User Accounts](#)
- [Company Functions](#)

## Before You Begin

Prior to setting up access to Accolade, ensure that you have the following items:

- The initial Accolade administrator login created during the installation, or the login of any Accolade user with the Administrator user role, for example your own login name and password.
- The access groups hierarchy your company plans to use.

---

**Important!** The design of the access groups hierarchy is a critical process. The structure of the hierarchy greatly determines information access and security and plays a major role in how much time it takes to administer Accolade.

Design and create the access groups hierarchy early in the implementation. Changing the hierarchy after a large number of users and projects have been entered into the system can be a time-consuming process.

For more information, see ["Designing the Access Group Hierarchy" on page 25](#).

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- The structure of the security lists your company plans to use if you decide to enable security lists.
- The login name, email address (optional), online conferencing tool address (optional), and role(s) for each Accolade user.

Depending on how Accolade was installed, an Accolade user's login name could be the same as the login in their Windows domain account, or local machine account.

Familiarize yourself with Accolade roles and the authority granted to those roles. Roles are key to workflow and security in Accolade. For more information about Accolade roles, see ["Users and User Accounts Overview" on page 54](#).

## Access Groups Overview

An access group is a container that determines what information users can access. Access groups can be assigned to all areas of a project, including classes, process models, projects, reference tables, layouts, metrics, templates, quick grids, and planning elements in Accolade Innovation Planning. Access groups operate in combination with security lists and security profiles. If your company uses security lists, then users must have access to both access groups and security lists to have access to project information.

Access groups restrict project and information access in the following areas:

- Reporting in Accolade Office Extensions and Accolade Online Reporting
- Upcoming Gates
- Reference Tables

- Planning Elements in Accolade Innovation Planning
- Portfolio Optimizer Scenarios
- Classes
- Process Models
- Layouts
- Deliverables and Activities
- Metrics
- Matrices
- Templates
- Quick Grids
- Workflows
- Functions
- Search

**Note:** A user still has access to a project through search if the user is a member of the project team, even if the user does not have access group access.

These areas only display project data for access groups to which a user belongs. The access group settings in a user's account must match the settings for a project, reference table, or planning element for information access. However, an access group assignment does not restrict who can be added a project team, unless the **Enforce Project Security for Add Team Member** system parameters is enabled



## Access Group Best Practices

Keep the following set of best practice recommendations in mind when designing the access groups structure:

- **Design Early** - The access groups hierarchy design is a critical process and should happen early in the Accolade implementation. Changing the hierarchy after a large number of users and projects are entered into the system can be a time-consuming process.
- **Keep it Simple** - Keeping the structure simple makes it easier to assign users and projects correctly and efficiently. It minimizes unintended denials of information, and is easier for other administrators to understand the system.
- **Limited Use of Root Access Group** - Assign few or no users to the **Root** access group. Keeping the Root group sparsely populated reduces maintenance in case you decide to redesign the groups structure or to add restricted groups high in the hierarchy.
- **Restricted Users** - Create a special group for Restricted Team Members and do not add any projects to it. All users must be assigned to at least one access group. Because

users still have access to projects to which they are assigned, assign users with the Restricted Team Members role to this access group.

- **Idea Project** - Create a special group for the initial assignment of all idea projects. Idea Managers can re-assign promising ideas to other groups after the initial evaluation.
- **Automate the Access Group Assignment** - Create a calculated metric that automates a project's access group classification. Using a metric at the model level allows you to make a project more or less secure based on a metric's value.
- **Restrict Access Group Assignment at the Process Model Level** - To help ensure that portfolios and other projects are created in the correct access group, set restrictions on where projects created using a model can exist. Without restrictions, Process Managers and Idea Managers can create and move projects to the access groups that are assigned to their user. With access group restrictions, they can only create and move projects to the access groups that are assigned to their user that are also part of the restricted list.
- **Tests and Training** - Create a special group for test projects and training new employees. This allows users to learn and experiment in Accolade without mixing practice and training projects in with real, ongoing company projects.
- **Project Assignments** - Whenever possible, assign users to projects within their access group assignments. Users can still participate in projects outside those access group when assigned on the project. For example, as a Document Reviewer.

### Information Security Examples

Consider the following information security examples as you are planning the security framework at your company.

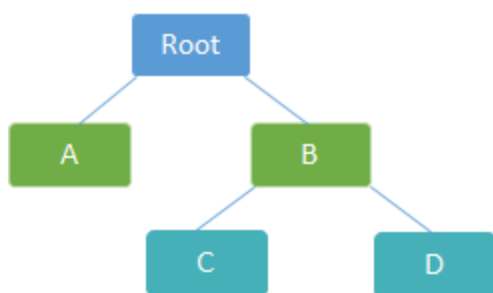
- Using the Restricted Team Member role and the access groups tree, you can set up several different levels of information security in your projects. For example, use the access groups hierarchy to restrict the information in some projects to project members only while making the information from other projects available to everyone.
- Using the Restricted Team Member role to prevent users from seeing any information other than the deliverable and activity pages that they own. They cannot see other projects, other team member assignments in their own projects, or other project information available.
- Assigning Project Team Members and Project Managers to an access group that contains no projects and has no children that contain projects, restricts those users to accessing only the project pages of projects to which they are assigned. They cannot search for any projects or documents. They can see all the deliverables and activities in their own projects, but none in other projects.
- Assigning Project Team Members and Project Managers to an access group that contains their own project but that has no children, allows them to search for documents in their own projects only. They can access deliverables in their own project both through Search and through the Project pages, but they cannot see other projects.

- Creating all access groups as children of the Root access group and assigning Project Team Members and Project Managers only to projects in their own group allows these users to see and search for information in all of the projects in their group but prevents them from seeing any information from projects in any other groups.
- Assigning users to an access group that contains multiple projects or one with children that contain multiple projects, allows the users to search for and access many projects and their documents. These users can access the projects that they can see both through the Project pages and through Search.
- Assigning Process Managers, Executives, and other users who cannot be members of a project to a group that is part way down the access groups tree completely hides project information in the portions of the tree above where they are assigned. For example, a Process Manager assigned in this manner only sees a portion of the total number of projects when viewing projects through the Upcoming Gates page. Making this kind of assignment can cause unexpected problems. For example, a Resource Planner would not see all of the projects that might be pulling resources from one of her pools.
- To give users access to all projects in Accolade, assign them to the Root access group.

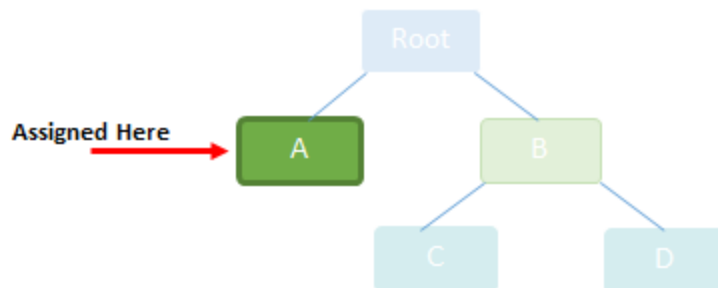
## Designing the Access Group Hierarchy

Access groups are arranged in a hierarchical tree structure. The tree determines ease of maintenance and openness of information flow. Simpler trees make it easier to provide adequate information access. Complex trees are more time consuming to maintain but offer more specific information control. The access group tree and information control is specific to your company. Use the information below to guide you in building your access group structure.

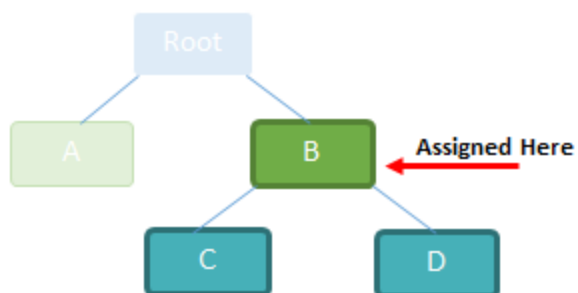
Accolade installs with a default access group called **Root**, which is always at the top of the tree. You cannot delete this group; however, you can rename it. All additional groups are either a child of **Root**, or a child of another access group in the tree. Thus, a user who is a member of **Root** has access to every project and document in the system.



Users can search for documents, projects, see links to projects, and see chart and report information about projects and reference tables that are assigned to the same access group to which the user is assigned, or an access group that is in the same branch. In the hierarchy above, a user assigned to Group A is able to access projects and information in Group A, but not access to projects and information in Groups B, C, or D.



A user assigned to access Group B is able to see information in Groups B, C, and D (because Groups C and D are children of Group B), but cannot see information in Group A.

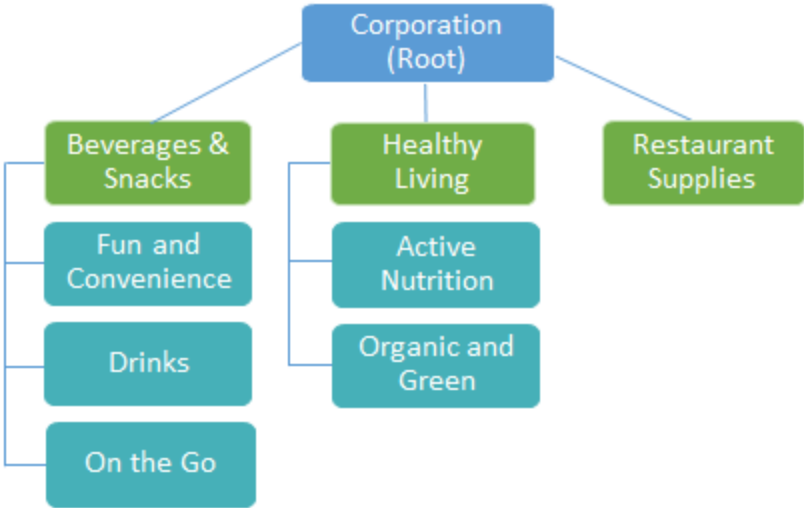


**EXAMPLE** Example

A consumer goods company has business units named for the general categories of the product types they develop, such as:

- Beverages & Snacks
- Healthy Living
- Restaurant Supplies

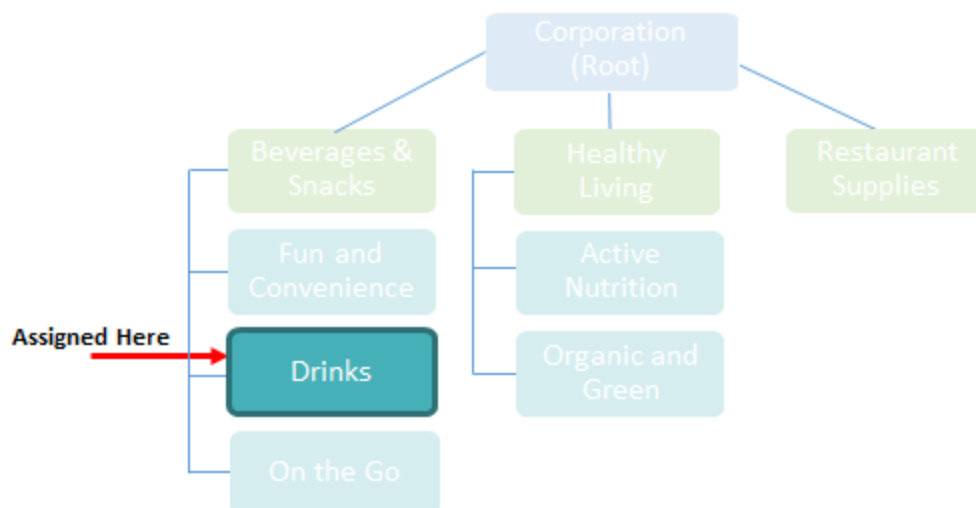
The company has created access groups named for each business unit. Optionally, a company could create access groups under each business unit representing brands within each unit. For example, in the Beverages & Snacks business unit, there are brands for Drinks, Fun and Convenience, and On the Go products.



Depending on security needs, users can be assigned at the brand level (Drinks) or at the business unit level (Beverages & Snacks). A user added to the Beverages & Snacks access group can see everything in Drinks, Fun and Convenience, and On the Go, but cannot access any projects in the Healthy Living or Restaurant Supplies business unit.



If a user is assigned at the Drinks brand level, they can access all the projects in the Drinks brand but not in the Fun and Convenience or On the Go brand.





**Note:** If Accolade Innovation Planning is enabled, a second default group, **[Innovation Planner Default]** is added as a child of **Root**. It is the group to which all planning elements are added when they are created. You cannot delete this default group; however, you can rename it, and you can assign planning elements to a different access group once they are created.

In the most open tree, everyone is assigned to **Root** and has access to all information. Or, perhaps only a few users are assigned to **Root** and a few others are in groups part way down the tree. In the later of the structure, team members can access only the information in projects to which they belong. Only a few users, such as Executives, can see project information from more than one group.

## Creating Access Groups

Access groups are arranged in a hierarchical tree that Administrators and Process Designers create in Accolade by adding groups in a nested structure.


### To create an access group:

- From the **System** menu, select **Security & Groups > Access Groups**.  
The current access group tree displays.
- In the **Access Groups** list, select the group to which you want to add a child group.  
To create the first group in a new hierarchy, select the top most group (Root).  
 Based on your company's configuration, the top level group may have been named something other than Root.
- In the upper right corner of the **Access Groups** list, click  to add a new access group.
- In the **Name** field, enter a unique name for the new group.



5. In the **System Name** field, enter a unique system name for the new group.
6. Click **Create** to create the new group.

The new group displays in the hierarchy.

-  To rename an existing group, select the group to rename in the hierarchy, update the name in the **Name** field, and click **Apply**.

## Deleting Access Groups

You can delete an access group if it does not contain any configuration items (process model, layout, metric, ...) in the access group hierarchy. As an Administrator, you can move users and reference tables to a different access group and delete empty child access groups. However, a Process Manager must move projects to a different access group. A Process Designer or someone with Root access group permission must move process models to a different access group.

An access group may be deleted while referenced in a snapshot; however, when the access group is deleted it is also deleted from the snapshot.

To determine what is currently assigned to an access group, see ["Reporting on Access Group Contents" on page 29](#).

### To delete an empty access group:

1. From the **System** menu, select **Security & Groups > Access Groups**.  
The current access group tree displays.
2. In the **Access Groups** list, select the group to delete.  
Select the lowest child of the access group, or the group itself if it has no children.  
The name of the selected group displays in the **Name** field in the Access Group editor.
3. Click **Delete** to remove the access group.

## Reporting on Access Group Contents

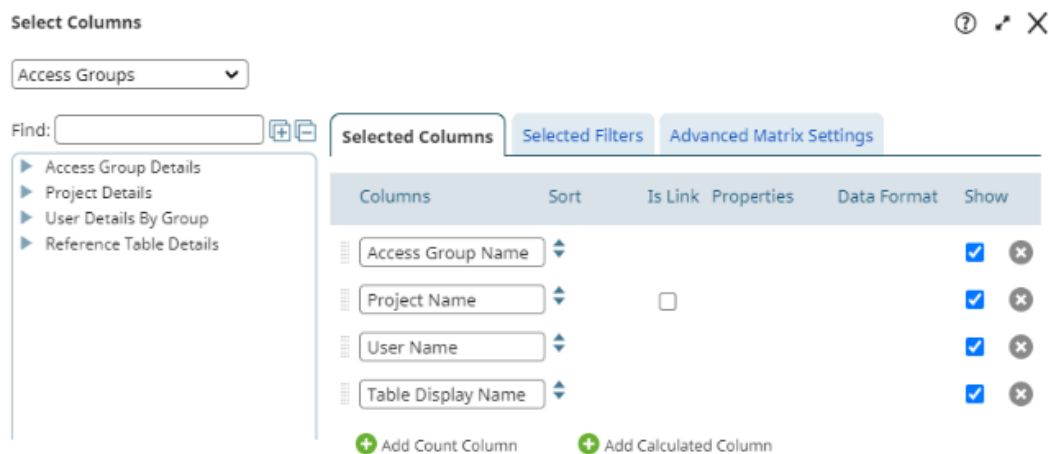
An access group is assigned to users, projects, reference tables, and planning elements in Accolade Innovation Planning. Use a report to determine if an access group currently contains any of the items listed above.

Knowing an access group's contents can help you better understand an existing access group structure, or to identify items that need moving prior to deleting an access group.

### Reports created using the Accolade Office Extensions add-in and Accolade Online Reports

Using the Access Groups subject, add the following columns:

- Access Group Name
- Project Name
- User Name
- Table Display Name



## Query in an HTML Report

Create SQL queries that select columns from the following reporting views:

- **RVP\_ProjectsByGroup** - Select the ProjectName and AccessGroupName columns to return information about the projects assigned to an access group.
- **RV\_ReferenceTables** - Select the RTableName and RTableAccessGroup columns to return information about the reference tables assigned to an access group.
- **RV\_UsersByGroup** - Select the UserID and AccessGroupName columns to return information about the users assigned to an access group.

Include the **ParentGroupName** column in any of the above reporting views to also select the parent group's name.

See "[Creating Excel Report Templates Using Queries](#)" on page 363 for more information about how to define a query and create a report.

## Restricting Configuration via Access Groups Overview

Use access groups to restrict reporting and configuration components within Accolade. Defining who can view and edit components in the system allows your company to establish corporate guardrails and mitigate risk of Process Designers accidentally making changes to items outside of their business group or division. Establishing an access group hierarchy and restricting edit rights within that hierarchy allows for configuration flexibility while still ensuring corporate standards for configuration are met.

A Process Designer might be able to view a corporate-level process model but not be able to edit it. They would, however, be able to edit components within the process model such as deliverables specific to their business unit or division. By segmenting configuration and restricting configuration edit permissions, you can ensure business units across your company follow corporate guidelines such as processes for process models while still granting autonomy at the lower division levels. When designing access group hierarchies, consider the corporate use of configuration and the local autonomy of employees that need to view and/or edit items within their business unit or division.

For example, Process Designer Sandy has access group view and edit permissions at the corporate level. She can view and edit configuration for all the business groups and divisions in the organizational hierarchy. She might set corporate standards that apply across the organization.

Process Designer Jeff can only edit requirements for his business group and the divisions below. However, he has view access group permissions for the Electronics business group and corporate configurations so he can view configurations and collaborate across the organization.

Restricting configuration components is driven by the access group assignment of the configuration component **and** the access group assignment of the user. When assigning users to access groups, assign them additional view and edit permissions within the access group.

Configuration components that respect access group restrictions include all levels of process model and reporting setup, to include classes, process models, gate documents, layouts, deliverables and activities, metrics, matrices, templates, quick grids, workflows, functional areas and functions, online charts and reports, and Accolade Office Extensions reports.

### Restricting Configuration for Classes

Restrict who can view and edit classes by assigning the class 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 class.

**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 class must match the user permissions of other Process Designers in order to display for them.

**To restrict class configuration:**

1. From the **System** menu, select **Process > Classes**.  
To narrow the class list, search by the class name, system name, or category.
2. Either select the class to edit.
3. Click the **Security** tab to display the configuration access group settings.
4. Select the access group(s) to which this class 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 class is selected to the highest level access group listed by default. Note that the class 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 class, depending on their individual access group permissions.

5. Click **Apply** to save your changes.

## Restricting Configuration for Process Models

Restrict who can view and edit process models by assigning the process model 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 process model components.

**Note:** The access groups that display for selection are based on your access group permissions as defined in your [user profile](#) and the access groups assigned to the class the model is being attached to. Additionally, access group settings on the process model must match the user permissions of other Process Designers in order to display for them.

**To restrict process model configuration:**

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Click the **Security** tab to display the configuration access group settings.
3. Select the access group(s) to which this process model 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 process model is selected to the highest level access group listed by default. Note that the process model 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 process model, depending on their individual access group permissions.

4. Click **Apply** to save your changes.


## Restricting Configuration for Gate Documents

Restrict who can view and edit gate documents by assigning the gate document 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 gate document.

**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 gate document must match the user permissions of other Process Designers in order to display for them.

Gate documents inherit the access group visibility assigned for the model. All deliverables and activities on the model display regardless of their individual access group assignments.

### To restrict gate document configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
  - **To add a new gate document** - In the **Component Tree** tab, click  next to the gate to add the gate document.
  - **To edit an existing gate document** - Expand the gate within the component tree and select the gate document.
4. Select the access group(s) to which the gate document belongs.

The access groups 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 gate document is selected to the highest level access group listed by default. Note that the gate document 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 gate document, depending on their individual access group permissions.


5. Click **Apply** to save your changes.

## 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.



## Restricting Configuration for Deliverables and Activities

Restrict who can view and edit deliverables and activities by assigning the deliverable or activity 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 deliverable or activity.

**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 deliverable or activity must match the user permissions of other Process Designers in order to display for them.

Deliverables and activities inherit the access group visibility assigned for the model. All deliverables and activities on the model display regardless of their individual access group assignments.

### To restrict deliverable and activity configuration:

1. From the **System** menu, select **Process > All Models** and select the model to edit.
2. Do one of the following:
  - **To add a new deliverable** - In the Model tree, click  next to the stage to add the deliverable to.
  - **To add a new activity** - In the Model tree, click  next to the deliverable to which the activity applies.
  - **To edit an existing deliverable or activity** - Expand the stage or deliverable within the Model tree and select the deliverable or activity.
3. Select the access group(s) to which the deliverable or activity belongs.
 

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

The deliverable/activity is selected to the highest level access group listed by default. Note that the deliverable/activity 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 deliverable and activity, depending on their individual access group permissions.
4. Click **Apply** to save your changes.

## Restricting Configuration for Metrics

Restrict who can view and edit metrics by assigning the metric 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 metric.

**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 metric must match the user permissions of other Process Designers in order to display for them.

**To restrict metric configuration:**

1. From the **System** menu, select **Content Sources > Metrics**.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page and create the metric.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
3. Click the **Security** tab to display the configuration access group settings.
4. Select the access group(s) to which this metric 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 metric is selected to the highest level access group listed by default. Note that the metric 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 metric, depending on their individual access group permissions.

5. Click **Apply** to save your changes.

## Restricting Configuration for Matrices

Restrict who can view and edit matrices by assigning the matrix 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 matrix.

**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 matrix must match the user permissions of other Process Designers in order to display for them.

**To restrict matrix configuration:**

1. From the **System** menu, select **Content Sources > Matrices**.
2. Do one of the following:



- **To add a new matrix** - Click **Add New** in the upper right corner of the page and create the matrix.
  - **To edit an existing matrix** - Click the name of the matrix to open it for editing.
3. Click the **Security** tab to display the configuration access group settings.
  4. Select the access group(s) to which this matrix 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 matrix is selected to the highest level access group listed by default. Note that the matrix 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 matrix, depending on their individual access group permissions.
  5. Click **Apply** to save your changes.

## Restricting Configuration for Templates

Restrict who can view and edit templates by assigning the template 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 template.

**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 template must match the user permissions of other Process Designers in order to display for them.

### To restrict template configuration:

1. From the **System** menu, select **Page Design > Template Library**.
2. Do one of the following:
  - **To add a new template** - Click **Add New** in the upper right corner of the page and create the template.
  - **To edit an existing template** - Click the name of the template to open it for editing.
3. Select the access group(s) to which this template 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 template is selected to the highest level access group listed by default. Note that the template 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 template, depending on their individual access group permissions.


4. Click **Apply** to save your changes.

## Restricting Configuration for Quick Grids

Restrict who can view and edit quick grids by assigning the quick grid 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 quick grid.

**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 quick grid must match the user permissions of other Process Designers in order to display for them.

### To restrict quick grid configuration:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Do one of the following:
  - **To add a new quick grid** - Click **Add New** in the upper right corner of the page and create the quick grid.
  - **To edit an existing quick grid** - Click the name of the quick grid to open it for editing.
3. In the Quick Grid Design section under **Configuration Access Groups**, click  to select the access group(s) to which this quick grid 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 quick grid is selected to the highest level access group listed by default. Note that the quick grid 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 quick grid, depending on their individual access group permissions.

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

## Restricting Configuration for Workflows

Restrict who can view and edit workflows by assigning the workflow 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 workflow.

**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 workflow must match the user permissions of other Process Designers in order to display for them.

### To restrict workflow configuration:

1. From the **System** menu, select **Process > Workflows**.
2. Do one of the following:
  - **To add a new workflow** - Click **Add New** in the upper right corner of the page and create the workflow.
  - **To edit an existing workflow** - Click the name of the workflow to open it for editing.
3. Click the **Security** tab to display the configuration access group settings.
4. Select the access group(s) to which this workflow 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 workflow is selected to the highest level access group listed by default. Note that the workflow 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 workflow, depending on their individual access group permissions.


5. Click **Apply** to save your changes.

## Restricting Configuration for Functions

Restrict who can view and edit functions by assigning the function 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 function.

**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 function must match the user permissions of other Process Designers in order to display for them.

**To restrict function configuration:**

1. From the **System** menu, select **Security & Groups > Functions**.
2. Do one of the following:
  - **To add a new function** - Click  in the lower left corner of any functional area and create the function.
  - **To edit an existing function** - Click on the function field you want to edit.
3. To configure access groups, click on the function's access group cell to open a dialog where the function's access group(s) may be edited.
4. Select the access group(s) to which this function 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 function is selected to the highest level access group listed by default. Note that the function 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 function, depending on their individual access group permissions.
5. Click **Apply** to save your changes.


## Restricting Configuration for Charts and Reports


Restrict who can view and edit configurable Accolade charts and reports by assigning the chart or report 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 chart or report.

**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 chart or report must match the user permissions of other Process Designers in order to display for them.

**To restrict online charts and reports configuration:**

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Do one of the following:
  - **To add a new chart or report** - Click **Add New** in the upper right corner of the page and create the chart or report.
  - **To edit an existing chart or report** - Click the name of the chart or report to open it for editing.

 You must either be an owner of the existing chart or report, or it must be set as **Available to Configuration** in the **Shared Charts & Reports** section.

- Under **Configuration Access Groups**, click  to select the access group(s) to which this chart or report 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 chart or report is selected to the highest level access group listed by default. Note that the chart or report 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 chart or report, depending on their individual access group permissions.

- Click **Save** to save your changes.




### Process Model Component Tree

A component tree has been added to the process model configuration definition, displaying all Accolade objects associated with the process model, including stages, gates, deliverables, activities, custom layouts, metrics, matrices, charts, reports, queries, quick grids, templates, and workflows. With a quick view, Process Designers can determine which Accolade components have been correctly configured based on access group security restrictions.


**To view a process model's related components:**


- From the **System** menu, select **Process > All Models** and select the model to edit.
- Click the **Component Tree** tab to display the process components.

The components are grouped by type and can be expanded for additional review. Clicking on the component name will display the process model's parent access group on the left, and the component's access group on the right.

 Misaligned components will be highlighted in the component tree with a  or .

- Review and align the configuration access groups using the following guidelines:

Field	Description
 <b>In Trouble</b>	<p>This error states that the access group configuration of this item is inconsistent with one or more items that use it.</p> <p>To resolve, do one of the following:</p> <ul style="list-style-type: none"> <li>If the mismatch is on the parent side, the issue can be resolved by aligning the process model's access group on</li> </ul>

Field	Description
	<p>the Security tab.</p> <ul style="list-style-type: none"> <li>If the mismatch is on the component side, the issue can be resolved by aligning the component's access group in the component tree panel.</li> </ul>
<p><b>Warning</b></p> 	<p>This warning states that the access group configuration of an ancestor is inconsistent with one or more items that use it. This is usually resolved when the error at the parent level is addressed, If there is still a mismatch, do one of the following:</p> <ul style="list-style-type: none"> <li>If the mismatch is on the parent side, the issue can be resolved by aligning the process model's access group on the Security tab.</li> <li>If the mismatch is on the component side, the issue can be resolved by aligning the component's access group in the component tree panel.</li> </ul>

- Click **Apply** to save your changes.

## Security Lists Overview

Security lists are hierarchical lists of different object types that control access to projects and unowned resource pools. Security lists grant access based on matches between security list selections in a user account and security list selections in projects and resource pools. Security lists manage access based on a combination of factors rather than just on the structure of the access groups tree. Accolade supports the definition of up to five security lists, with a maximum of 10 levels in each list.

Security lists prevent the following:

- Users without access from seeing or navigating to project data in Upcoming Gates, Charts and Reports, or in optional components such as Accolade Portfolio Optimizer, Dashboards for Accolade, Accolade Innovation Planning, and the Accolade Office Extensions add-ins
- Users without access from linking to a related project to which they do not have access.
- Process Managers without access from managing projects to which they have Manage Process rights.
- Resource Pool Administrators from seeing or creating pools that are outside their scope of access.
- Resource Planners without access from seeing and modifying demand on resource pools they do not own.
- Resource Planners without access from modifying capacity.

Users can still access projects of which they are a member of the project team through All My Work, My Project, and through Search, regardless of their security list settings. Project members not assigned to the project cannot search for project data or refresh Accolade Office Extensions reports on their projects.

If security lists are enabled, the combination of both access groups and security lists controls access to projects. User settings for both access groups and security lists must match those set for a project for users to have access to that project. To base access primarily on security lists, you can give most users high level access or even access at the Root level within the access groups. However, because security lists do not affect the management rights of Process Managers and Idea Managers or access to data in Reference Tables, the access groups must be developed at least to the level at which you want to define these rights.

**Note:** Security lists do not control access to reference tables, and they do not affect the management rights of Process Managers and Idea Managers. Access groups control access for these roles.

Once defined, security lists are assigned to user accounts, projects, and resource pools.

**EXAMPLE** Example

A user with Paris selected in the hierarchy below could see reports on projects that also had Paris selected as long as the user and project also had the same check boxes selected in the other security lists in the system.



But this user could not search for projects in Dijon, Asia, or in projects that only had France selected. Note also that check boxes that are filled in  do not provide access. They indicate that one or more of their child items are selected.

Combine the settings from multiple security lists to create a more intricate security framework. For example, one security list could define sales territory as in the example above. A second security list could define products by division, product type, and brand. Access to project information would be based on a combination of location and product responsibilities.

Security list selections are available throughout the system to grant access to projects, resource pools, or planning elements in Accolade Innovation Planning.

## Building Security Lists Manually

Administrators can create security lists manually or using reference tables. How you choose to create security lists is up to you. The procedure below provides instructions to manually build security lists. See "[Building Security Lists Using Reference Tables](#)" on page 47 if you prefer to use reference tables.


Each security list contains a Default level, which provides access to the entire list. The additional levels that you define within the list are its primary categories. For example, in a list based on geography, the levels might be Country, Region, and City.

As you add security lists to your system, consider the following:

- User accounts have no security list options selected. Administrators must set security access for all users.
- Existing projects have all security list options selected. Process Managers and Project Managers must clear check boxes to limit access appropriately.
- Resource Pools have no check boxes selected. Resource Pool Administrators and Administrators must select security list options to grant Resource Planners, Resource Planners, and other users the appropriate access.


Accolade supports the definition of up to five security lists, with a maximum of 10 levels in each list.


### To build a security list manually:

1. From the **System** menu, select **Security & Groups > Security Lists**.
2. Click  to activate the security list you want to define.  
By default, all security lists are inactive.
3. Enter the following information to identify the security list:

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the security list.
<b>System Name</b>	<i>(Read Only)</i> Displays the system name of the list selected.
<b>Active</b>	Select the check box when the security list is ready to use. If list is inactive, the levels information will not be displayed in the security list tree.
<b>Levels</b>	<b>Level 1:</b> Enter the description name of the first level in the security list. This will be the highest level of access within the security list. Displays <b>Default Access</b> as a default.



Field	Description
	<p>Once the first level is created, Click  to add additional level description names to the security list.</p> <p><b>Note:</b> All security lists must contain a minimum of one level, and have a maximum of 10 levels on one security list.</p>

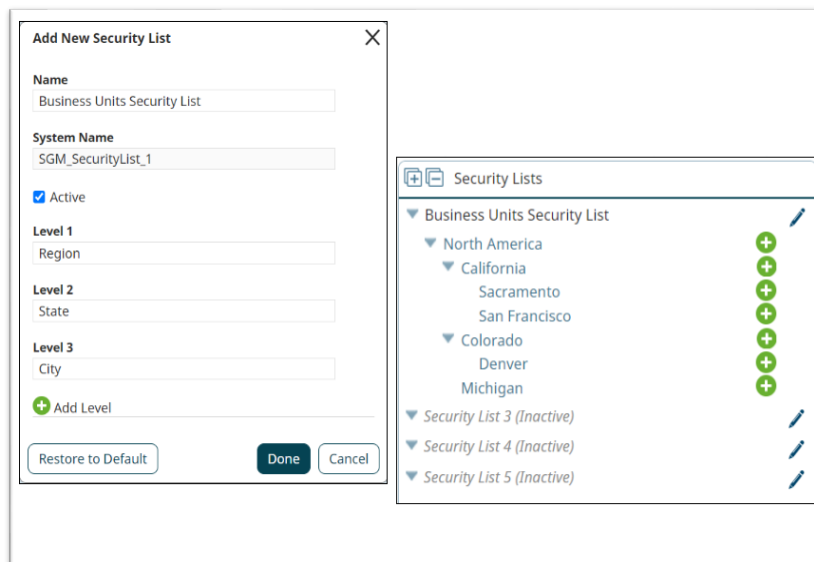
- 4. Click **Done** to save changes to the security list details.
- 5. To enter levels and categories:
  - Under the security list just created, click the **Default Access** to open the list editor. In the **Name** field, enter the name to define this parent node.
  - To enter additional levels or entries in the security list tree, click  to the right of the node. This will add a new entry to the level below it.
  - To add children levels, click on the **Children** field and enter the name of the child. Press **Enter** to continue add additional child levels to this node.

**Note:** Children categories can only be deleted prior to clicking **Apply**. Once saved, they are considered "in use" and cannot be deleted.

- 6. Click **Apply** to save your changes.



 Example

A user wants to manage their Accolade projects by managing their business units access within a security list. The business is within North America, in the states of California, Colorado, and Michigan. There are different operations areas in California and Colorado that will need to have separate access.





In the example above:

- There are 3 distinct levels defined in the business - Level 1 (Region), Level 2 (State), and Level 3 (City).
- Level 1 is the highest access level. It is defined as the Regional level, and in the system it is named North America.
- Level 2 is the next access level down. It is defined as the State level, and in the system it contains the entries California, Colorado, and Michigan.
- Level 3 is the lowest access level in the example. It is defined as the City level, and in the system it contains the entries Sacramento, San Francisco and Denver.

Remember that additional levels and/or entries can be added by clicking  on the security list tree, and entries are added beneath the level clicked. So for example, if the user wanted to add Detroit to the City level under Michigan, they would click  to the right of the Michigan entry.

#### Notes:

- To move an item up or down in the list, click an item and drag it to the new location.
- To remove a security list, click  next to the list and click **Restore to Default**. This will deactivate the list and clear all levels and nodes.
- To remove an entire heading row or an item, click  next to the heading row or item to delete. You must remove all child items before removing its parent, and entries that are already in use cannot be deleted.

- If you create Resource Editor filters that match pools to projects, a user with access to many pools and projects could experience significant wait times while the filters try to calculate matching pools and projects. To reduce the wait time, ensure the security lists you define for resource pools and projects have as few redundant selections as possible. .

Resource Planning is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.

### Building Security Lists Using Reference Tables

Administrators and Process Designers can create security lists manually or by using a reference table for each list.

To build a security list using a reference table, complete the following tasks:

- Create a spreadsheet file containing the security list information.
- Add the file to Accolade as a reference table.

See ["Building Security Lists Manually" on page 44](#) if you are an Administrator and prefer to build security lists manually.

### Creating the Spreadsheet File

Each reference table can contain one security list. Accolade supports up to five security lists, with a maximum of 10 levels in each list.

Create a spreadsheet file titled **SGM\_SecurityList\_<number>** that includes a worksheet named **SGM\_RefTableSheet** which contains the security list data and meets the requirements and specifications. Column headings are in the first row of the worksheet.

**Important!** The columns in the spreadsheet **must be** present and in the order listed for the security list to upload successfully.

Component	Requirements
<b>ID</b>	Enter a unique ID that identifies the item in the security list. IDs can include letters (English alphabet), numbers, and the underscore.
<b>ParentID</b>	Enter the ID number of this item's parent item. The parent is the item in the list hierarchy that this item appears to be contained in. <ul style="list-style-type: none"> <li>• The top item in the security list, which is the root item of the list, must have an empty cell in this column. If you were to create a second item with an empty cell in the <b>ParentID</b> column, you would create two separate lists.</li> </ul>

Component	Requirements
	<ul style="list-style-type: none"><li>• For every value that exists in the <b>Parent ID</b> column, there must exist an item that has that value in its <b>ID</b> column.</li></ul>
<b>Name</b>	Enter this item's name as it should appear in the displayed list hierarchy. This is the item's label within Accolade.
<b>Level</b>	Enter an integer specifying this item's level in the list hierarchy. The level numbers specify the parent-child relationship in the hierarchy. <ul style="list-style-type: none"><li>• There should be one item at the top level that is equivalent to the root level. This item should have level 1, and when this top level is selected, all levels are selected.</li><li>• Each level should only have one associated level name.</li></ul>
<b>Level Name</b>	Enter the name of the type of items that should be in this level.  The level name is not displayed in the security hierarchy. It is used by the table owner who maintains the reference table as a reminder to enter consistent and appropriate items in each level.

**EXAMPLE** Example

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

SGM\_RefTableSheet

Note the following in the example above:

- This example builds the list under a root list of Geography as follows:



- The column headings in order from left to right, on the first row of the worksheet. The worksheet is named **SGM\_RefTableSheet** and is loaded to Accolade as **SGM\_SecurityList\_1**.

### Adding the Reference Table to Accolade

After creating the worksheet with the security list information, save the file and add it to Accolade as a reference table.

Keep the following in mind when uploading the reference table to Accolade:

- Security list reference tables must have a **System Name** of **SGM\_SecurityList\_<number>** where <number> is 1 to 5. For example, "SGM\_SecurityList\_2", "SGM\_SecurityList\_3", and so on.
- The reference table display name is used as the list's name where the list is displayed within Accolade.

Enable [automatic uploading](#) to upload new versions automatically.

After a reference table is added to Accolade, its table owner can then upload later versions to maintain the contents of the table.

**Notes:**

- If projects already exist and you change the access value to a value other than the default, after uploading the security list reference table, also run a project import for the existing projects, specifying the values to set in the **Security List** data columns for those projects.

## Assigning Users to Security Lists


When security lists are first added to Accolade, they are configured with no users assigned to the list. Administrators must configure the security for all existing users.

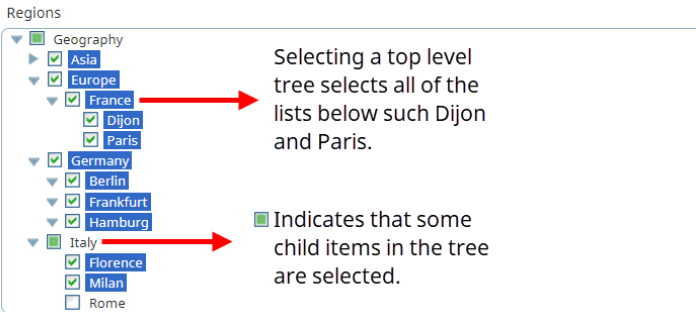
### To assign a user to a security list:

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing .
  3. Select the **Security Lists** tab.
  4. Select the check boxes for each security list to assign to the user, noting the tree structure.

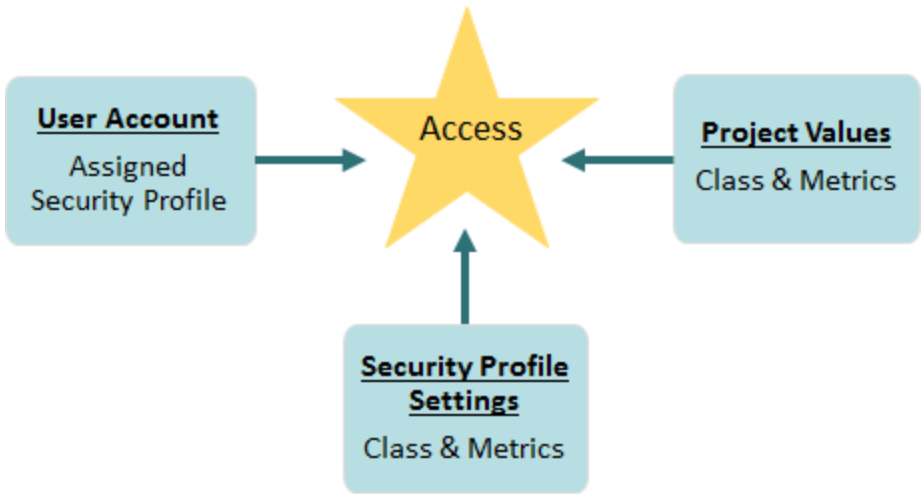
Selecting a top level of a tree selects all the lists below it. A check box filled with  indicates that some of its child items are selected, but does not provide access to the corresponding list.



5. Click **Save** to save your changes.

## Security Profiles Overview

Security profiles define project access based on classes and metric values associated with a project and a user. The class and metric value settings assigned to a project must match those assigned in the profile that is assigned to a user for the user to have access to the project information. Two users in the same access group can have access to separate sets of projects in that group using two different security profiles.



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**Important!** A profile can distinguish user access within an access group, but cannot grant access to projects or reference tables that the access group hierarchy denies.

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Security profiles restrict project and information access in the following areas:

- Reporting in Accolade Office Extensions and Accolade Online Reporting
- Upcoming Gates
- Reference Tables
- Planning Elements in Accolade Innovation Planning
- Portfolio Optimizer Scenarios

A security profile *does not* prevent users assigned to a project from navigating to it through All My Work or through Search. If a Process Manager is assigned as the project manager to a project that is restricted based on a security profile, the Process Manager only has the rights and permissions on the project that an assigned project manager has. The Process Manager loses all management rights for that project, except for Manage Team rights.



## Security Profiles Best Practices

Keep the following set of best practice recommendations in mind when designing security profiles for your organization:

- Use security profiles only when necessary. They can introduce additional risk that unintentionally blocks project information that your users need.
- Carefully analyze the class and metric structure before implementing security profiles. Can you accomplish the same security set up with access groups?
- Metrics used in security profiles must be a List, Multi-Select List, or String type metric. Number, Date, and Long String metric types are not available for use in security profiles.
- Metrics whose value is initialized from another metric, and calculated metrics are not available for use in security profiles.
- Accolade allows the definition of up to 250 profiles. However, keep it simple!

## Creating Security Profiles

Security profiles define project access based on classes and metric values associated with a project and a user. Associating a metric with a security profile further refines the access based on the values assigned to the metrics. The available metrics are those associated with models in the selected classes, so the metrics in a profile can distinguish access only within the selected classes.

**Note:** Prior to creating a security profile, ensure that the classes and metrics exist within Accolade.

### To create a security profile:

1. From the **System** menu, select **Security & Groups > Security Profiles**.  
To narrow the list, search by the category.
2. Do one of the following:



- **To add a new security profile** - Click **Add New** in the top right corner of the page.
  - **To edit an existing security profile** - Click the name of the security profile to open it for editing.
3. Enter the following information to identify the security profile:

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


Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the security profile.
<b>System Name</b>	Enter a unique, shorter name that identifies the security profile in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among security profiles, and can only contain letters (English alphabet), numbers, and the underscore.
<b>Description</b>	Enter a description of the purpose or nature of the security profile. This description helps other users identify the profile throughout the system.
<b>Category</b>	Enter or select the group to which this security profile belongs.  Use categories to organize like profiles together. <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Order</b>	Enter a number to specify the security profile's place in the list of profiles on the <b>Security Profiles</b> page. A smaller number places the profile higher in the list.
<b>Visible</b>	Select this check box when this security profile is ready for use.
<b>Classes</b>	Select which classes to include in this security profile.  <b>Note:</b> A security profile must have at least one class.

4. In the **Metrics** section, click **Add Metrics** and select one or more metrics to add from the **Available Metrics** list. Use the **Category**, **Name** or **System Name** options to filter the list of available metrics. Click **Select** to select the metrics, and then click **Done** when finished.

A metric must be a List, Multi-Select List, or String type and be associated with at least one model in a class selected in the profile to add it to a security profile. Additionally, security lists cannot include initialized or calculated metrics.

5. For each profile metric, click the **Value** column to specify the values.
  - **For List type metrics** - Select the values the metric must have to allow access to the project.
  - **For String type metrics** - Enter the exact string of characters that this metric must have to allow access to the project.
6. *(Optional)* To allow access to projects whose assigned process model does not include this metric, select the **Extended Access** check box. Extended access allows access to projects that do not contain the metric itself, not to projects that contain a different value for the metric.
7. Click **Create** to create the new security profile or **Apply** to save changes to an existing security profile.

**Notes:**

- To delete a security profile, ensure the profile is not in use, select the profile, and click **Delete**.
- Select  to print the list of security profiles.

## Users and User Accounts Overview

Each employee who uses Accolade has an Accolade user account that contains information that defines who the employee is and what he or she can do and see within Accolade.

Administrators create user accounts that identify a user by login, name, email address, and chat address. Administrators also assign each user a set of attributes that determines what the user can see and do, email notifications they receive about system activity, and the default language in which the application displays. See "[User Attributes Overview](#)" on page 74 for details about attributes you can assign after an account is created.

- 💡 See "[User Roles Reference](#)" on page 80 for information about user roles and their permissions within Accolade.

To help streamline user creation in your system, consider the following:

- **Template Users** - Create template users that represent various employee responsibilities in your organization. For example, to configure all your Project Managers in your Europe office the same, create a template user account called ProjectManager-Europe. Configure that user with the roles, access group, security settings, and so on that you want to assign to your Europe-based Project Managers. When you create a user account for a new Project Manager in Europe, you can select to

copy the account's attributes into the new account.


- **Importing and Updating User Accounts** - You can import multiple users using a specially formatted spreadsheet file. Importing users in this manner is useful when you are first setting up your system.
- **Synchronizing with Active Directory** - If your company uses Microsoft's Active Directory for user authentication and administration, you can synchronize the user accounts defined in Accolade to those defined in your Active Directory server. Synchronizing the user data between your Active Directory and Accolade allows you to maintain user data such as email addresses and user names in the Active Directory without having to maintain the information in multiple locations.

### Creating Accolade User Accounts


Create an Accolade user account for each employee that accesses Accolade. The user account contains the attributes the employee needs to do their job and to log in to Accolade.

The procedure below details how to create an individual account. See the additional topics in the Learn More section for information about defining attributes to the user account. To create multiple users at the same time, see ["Importing and Updating Accolade User Accounts" on page 58](#). If your company uses Microsoft's Active Directory for user authentication and administration, you can [synchronize the user accounts](#) in Accolade to those defined in your Active Directory.


**To create a user account:**

1. From the **System** menu, select **Security & Groups > User Admin**.
2. Click  to display the **Add New User** dialog box.
3. Complete the following information about the user:

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

Field	Description
<b>User Name</b>	Enter the user's name as you want it to display in Accolade.  <i>(Optional)</i> If the <b>Enable User Profile Images</b> system parameter is enabled, add a user profile image that displays with the user's name in various locations within Accolade, click  next to the user name, click <b>Choose Image</b> , navigate to and select the image to add, and click <b>Upload File</b> . To remove a profile image, click the image next to the user name and click <b>Remove</b> .  <b>Note:</b> To display as an image within

Field	Description
	Accolade, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, jfif, or .png.
<b>Login</b>	<p>Enter the login the user uses to access Accolade. You may consider keeping logins consistent, such as first initial and last name (jdoe) or first name.last name (jane.doe).</p> <p>Depending on how Accolade is installed, a user's login name could be the same as the login in their Windows domain account, or local machine account. For Windows Authentication, logins are <i>&lt;domain&gt;\&lt;login name&gt;</i> where <i>&lt;domain&gt;</i> is the network domain and <i>&lt;login name&gt;</i> is the login assigned to the user.</p>
<b>Email Address</b>	<i>(Optional)</i> Enter the user's corporate email address. Accolade uses this address for email notifications and for email links throughout the system.
<b>Chat Address</b>	<i>(Optional)</i> Enter the user's address for your company's selected chat tool.
<b>Resource Pool</b>	<p><i>(Optional)</i> Select the resource pool to which the user belongs. Users are grouped into resource pools for resource planning purposes for assignments to projects.</p> <p><b>Note:</b> This field is only available if your company uses the resource planning components within Accolade and at least one resource pool is defined.</p>
<b>Copy From</b>	<p><i>(Optional)</i> Click <b>[None]</b> and select the user whose configuration details you want to copy to this user. To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the</li> </ul>

Field	Description
	<p>function to which you are assigning a user, however depending on the project configuration, you can assign any user.</p> <ul style="list-style-type: none"> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p>Copying configuration details from existing users ensures that users that you want to have the same permissions are set up identically. It allows you to assign most of the details automatically, including the initial <b>All My Work</b> page and <b>Stages</b> page column configurations, and only make a few changes to the user.</p> <p>For example, you may have a set of Process Managers in your organizations that all receive the same configuration. Create one, and then copy the configuration to all others.</p> <p> Create a group of template users that have the appropriate functions, roles, extended fields, and other details that apply to all users in a group. Associating a template with each user applies details automatically as part of the create process.</p>


4. Click **Create** to create the user account.
5. Complete the user setup by adding or updating the following:
  - Assign [general user details](#).
  - Add [user roles and rights](#).
  - Grant [access group permissions](#).
  - Add [custom details and extended fields](#), if set as active for the user.
  - Define [security list](#) and/or security profiles, if in use by your company.
  - Define [user functions](#).
  - Set up [user-specific menu items and links](#).
  - Set up [project email notifications](#).
  - Set up [HTML report notifications](#).

## Importing and Updating Accolade User Accounts

Accolade provides Administrators and Process Designers the ability to export user accounts to update information, and to move configuration between environments. For example, if you are first setting up your system or opening a new office and have multiple user accounts to create at once, or if you need to update accounts such as renewing a user's access on a periodic basis, you can do so in two ways. Either execute all changes directly from the User Admin dashboard (See [Updating User Accounts](#)) or use a spreadsheet file with worksheet tabs to create and update the user accounts within Accolade. Below are details on how to update by spreadsheet.

Current user accounts can be downloaded from an Accolade environment, changes made to the data, and then uploaded either into the same environment, or moved into a new environment.

Administrators who wish to make bulk updates to user logins by spreadsheet can do so with the User Importer feature.

-  Create a group of template users that have the appropriate functions, roles, extended fields, and other details that apply to all users in a group. Associating a template with each user applies details automatically as part of the import process. Using filters allows you to assign details to a variety of sub-groups or combinations of groups.

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**Important!** In very large implementations we recommend running user imports in batches. The size of the batches will depend on the server performance and the number of updates per user, so that, for example, no more than a few thousand users are imported at a time.



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A download of current user accounts exports the user account configuration information into a spreadsheet file with the parts grouped into tabs.

### To download user accounts:


1. From the **System** menu, select **Security & Groups > User Admin**.
2. Select the users that you want to download.

To narrow the list by function or user name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive. To download all users, clear all search filters.

3. Click  in the users panel to view details of selected users.
4. Click  in the users panel.

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

**To import user accounts into Accolade:**

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any user account information that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > User Admin**.
4. Click  in the users panel.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the user accounts in the spreadsheet and adds any new user accounts with unique user logins.

**To update user logins en masse:**

1. After downloading the spreadsheet file, navigate to the **UpdateUserLogins** tab. This is the last tab on the downloaded spreadsheet file.

**Note:** The **UpdateUserLogins** tab will be pre-filled with the existing user login data from your selection.

2. Fill in the New User Login column with updated user logins.
3. Follow the previous steps to import updated spreadsheet file into Accolade.



**Applying Template User Settings to Existing Users**

In Accolade versions 16.0 and later, Administrators can apply the settings of an existing user (hereby referred to as a "template user") to other existing users. This can be done via the Accolade User Interface (UI), the application programming interface (API), or by using the User Importer feature. The instructions below discuss how to use the User Importer feature to apply the settings of a template user to an existing user. See [Updating User Accounts](#) for instructions on how to use the Accolade User Interface instead.


**To apply template user settings to existing users:**

1. From the **System** menu, select **Security & Groups > User Admin**.
2. Select the users that you want to download.

To narrow the list by function or user name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive. To download all users, clear all search filters.

3. Click  in the users panel to view details of selected users.
4. Click  in the users panel.

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

5. From the **User Admin** dashboard, search for the template user you wish to copy.
6. Select the appropriate template user from the search results list.
7. In the General Details tab of the **User Admin** dashboard, copy the template user's login.
8. In the downloaded spreadsheet, navigate to ImportUsers tab, which is the first tab and displayed by default.
9. In the Copy From User column, paste the copied template user's login for each existing user whose settings you wish to update.
10. Save the file.
11. From the **System** menu, select **Security & Groups > User Admin**.
12. Click  in the users panel.
13. Click **Load File** and select the spreadsheet file to load.
14. Click **Upload File**.

Accolade uploads the changes to the user accounts in the spreadsheet and adds any new user accounts with unique user logins.

### User Account Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each user account in the order listed below. For a description of each user account setting, see the Creating Accolade User Accounts or User Attributes Overview 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.

---

- Import Users

Column Name	Accepted Values on Upload*	Additional Notes
<b>User Name</b>	Alphanumeric characters, underscore**	If blank, the user account does not upload.
<b>User Login</b>	Any	Use the format with which the user accessed



Column Name	Accepted Values on Upload*	Additional Notes
		<p>Accolade, such as domain\username or username@domain.com.</p> <p>Used for matching for upload.</p> <p>If a user account exists, its settings are changed with the values in the uploaded file.</p> <p>If a new, unique system name exists in the file when uploaded, a new user account is created.</p> <p>If blank, the user account does not upload.</p>
<b>Email Address</b>	Valid email address	Can be blank.
<b>Chat Address</b>	Valid chat address	Can be blank.
<b>Resource Pool</b>	Valid resource pool display name	Can be blank.
<b>Copy From User</b>	User login of user account to copy from	<p>Use the format (<i>username</i>) without the parentheses.</p> <p>If the import creates a new user account, the copy from user account settings will be used for the new user setup, and all other tabs in the import worksheet will be ignored.</p> <p>Can be blank.</p>
<b>Language</b>	An active language	If blank, defaults to English.
<b>Date Format</b>	A valid date format enum	If blank, defaults to MMM dd, yyyy (Feb 28, 2020).
<b>Expiration Date</b>	Valid date	<p>Use the format MM/DD/YYYY.</p> <p>Can be blank.</p>
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show Messages</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Enable Auto Search</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Reporting Rights</b>	None Refresh AllRights	If blank, defaults to <b>None</b> .
<b>My Project Page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Updates</b>		
<b>Email Format</b>	HTML Plain Text	If blank, defaults to <b>Plain Text</b> .
<b>Send Email Number of Days before Defined Date</b>	Valid number	If blank, defaults to <b>7</b> .
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Security Lists

Security lists are optional when importing user accounts. The worksheet must be included in the spreadsheet file, but can be left blank if the users do not have security list assignments.

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Security List Name</b>	Valid security list system name	Can be blank.
<b>Security List Value</b>	Valid security list value system name	For each security list field above, include the value for that field to assign to each user. For multi-select extended fields, include a separate row for each value. On import, if a security list value is not included in the sheet, the existing settings for that user are preserved for that field. If a value currently assigned to a user is not included in the sheet, the value is removed from the user.

- Functions

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Function</b>	Valid function system name	Include a separate row for each function.

- Roles

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Role</b>	Valid Accolade user role	Include a separate row for each role.

- Portfolio Optimizer Rights

Portfolio Optimizer is an optional Accolade component that may not be used by your company. The worksheet must be included in the spreadsheet file, but can be left blank if you do not use Portfolio Optimizer.

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Right</b>	PortfolioLoad PortfolioSave ScenarioLoad ScenarioSave	Include a separate row for each right to be assigned.

- Pools Rights

Resource Planning is an optional Accolade component that may not be used by your company. The worksheet must be included in the spreadsheet file, but can be left blank if you do not use Resource Planning.

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Pool Name</b>	Valid resource pool display name	Include a separate row for each pool. Can be blank.



- Extended Fields

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Extended Field 1...10</b>	Valid extended field name	Enter <b>ExtendedField_</b> and the field ID of the field being updated.

Column Name	Accepted Values on Upload	Additional Notes
		This entry, in combination with the data type field in the next column, identify the field being updated. For example, use the following format: ExtendedField_1 or ExtendedField_24.
<b>Extended Field Data Type</b>	Date List Long String Multi-Select Number String	Enter the data type of the field being updated. This entry, in combination with the Extended Field value in the previous column, identify the field being updated.
<b>Value</b>	Valid extended field value	For each extended field above, include the value for that field to assign to each user. For multi-select extended fields, separate values using a pipe (   ) character. On import, if an extended field value is not included in the sheet, the existing settings for that user are preserved for that field. If a value currently assigned to a user is not included in the sheet, the value is removed from the user. If an extended field that is defined as required is not included or does not include a value, the user is set to inactive.

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet.  If a user account exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.  If users are assigned a root level or parent access group, they will be automatically assigned to the child groups of that access group.

Column Name	Accepted Values on Upload	Additional Notes
		<p><b>Important!</b> Access group permissions are not always additive to what is already defined in the Accolade environment. The Administrator doing the import can only make changes to access groups that they can manage. With matching access, the import will add or replace access groups according to what is specified in the file.</p> <p> Do not leave the column blank unless you intend to clear out the settings for the specified user.</p>
<b>Access</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Manage Team</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Manage Process</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Migrate Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete Activity</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>View Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Edit Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload. If <b>Edit Configuration</b> is selected as <b>Yes</b> , <b>View Configuration</b> will automatically default to <b>Yes</b> .
<b>Member Of</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.  MemberOf access <i>does not</i>

Column Name	Accepted Values on Upload	Additional Notes
		💡 propagate down to child groups.
<b>Admin Of</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.  💡 AdminOf access <i>does</i> propagate down to child groups.

\* 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.

- Security Profiles

Security profiles are optional when importing user accounts. The worksheet must be included in the spreadsheet file, but can be left blank if the users do not have security profile assignments.

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet.  If a user account exists, its settings are changed with the values in the uploaded file.
<b>Security Profile</b>	Valid security profile system name	If system name is entered, then the value is <b>TRUE</b> for that system name.

- User Links

Column Name	Accepted Values on Upload	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet.  If a user account exists, its settings are changed with the values in the uploaded file.
<b>Title</b>	Alphanumeric characters, underscore**	If blank, the link does not upload.

Column Name	Accepted Values on Upload	Additional Notes
<b>Link</b>	http:// https:// ftp:// file:// qvp:// mailto: callto:	If blank, the link does not upload.
<b>URL</b>	Valid link URL	If blank, the link does not upload.
<b>Link Number</b>	Any number 1-5	If blank, the link does not upload.

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

- Email Notifications

Column Name	Accepted Values on Upload*	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet.  If a user account exists, its settings are changed with the values in the uploaded file.
<b>Notification</b>	Valid email notification option  See the Email Notification Distribution Reference topic in the online Help for options.	Can be blank.
<b>On Selected Days</b>	Yes, Y, True, 1, X*	If <b>YES</b> is entered, select at least one of the day options on the <b>Email Days</b> worksheet.  All other values are treated as <b>No</b> on upload.
<b>Immediately</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Notification System Name</b>	Valid notification system name	If blank, the notification does not upload.

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



- Email Days

Column Name	Accepted Values on Upload*	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Monday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Tuesday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Wednesday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Thursday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Friday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Saturday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Sunday</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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.

- Assignment Notifications

Column Name	Accepted Values on Upload*	Additional Notes
<b>User Login</b>	Valid Accolade user login	Used for matching for upload. Must match a user login from the <b>Import Users</b> worksheet. If a user account exists, its settings are changed with the values in the uploaded file.
<b>Past Stages</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Current Stages</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Future Stages</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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.

**Notes:**

- Accolade Portfolio Optimizer is an optional Accolade component that you may

not have access to. To implement this solution, contact [Sopheon Customer Support](#).

- Resource Planning is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.

## Deactivating and Removing User Accounts

As employees change roles or leave your company, you can choose to remove their Accolade user all together, or disable their access by deactivating the user account.

- **Deactivating User Accounts** - Deactivating a user account removes the access for that user, allowing Administrators to save the account information, but ensuring the user cannot access Accolade. Reactivation reinstates assignments and email notification settings as they were set prior to deactivation. Deactivate accounts for situations such as a leave of absence, or a time period when an employee does not require Accolade access. If you use Active Directory to maintain user information in Accolade, you can disable users in Active Directory to deactivate them in Accolade; however, you cannot reactivate an Accolade user account using Active Directory.
- **Removing User Accounts** - Removing a user account removes the user from any default assignments within process models, and removes the user from any project teams. However, the user is not removed as the owner of deliverable or activities in either completed or currently in progress documents. Create reports identifying the deleted user's assignments to identify what needs reassignment.

Removing a user does not delete the user name from the system. For historical record and auditability purposes, projects and other areas of the system will still reference the original user name even when that user is removed. To mask the user name, change the user's name to a generic placeholder like Bob M#####. A name with a strike-through indicates a deleted user (i.e., ~~Bob M#####~~) throughout the system.

Removing a user deletes the following user data:

- User Image
- User Email
- Chat Address
- User extended field values

Additionally, when a user is deleted, the system maintains the state of the user account at the time of deletion for historical and auditability purposes. For example, if a user is active at the time of deletion, the user account will still be marked as active in the database.

**To deactivate a user account:**

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, select the user(s) to modify.
  3. In the **General Details** section, clear the **Active** check box to indicate the user is deactivated.
  4. Click **Save** to save your changes.

**To remove a user account:**

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
- Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
- Click **More options** check box displays or hides the additional filter options.
- In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
  - **Active Users Only** - excludes inactive users.
  - **Show All Users** - displays active and inactive users.

- **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, select the user(s) to modify.
  3. Click **Delete User(s)** and click **OK** at the prompt.

**Notes:**

- Remove user accounts when employees are no longer with your company or if a user [withdraws consent](#) in accordance with GDPR regulations. If you remove a user, inform the Process Designers in your organization to update default assignments on process models, as necessary. Understand that deleting a user is a permanent action and cannot be restored. If a user might be reactivated in the future, consider deactivating the user account instead of deleting it.

## Locating Records of User Changes

You can find the history of changes to Accolade users in the history tables in the Accolade database. Each separate change to a user record is identified by a HistoryID column in each table.

The following tables record user history:

- **HIS\_Users** - Records who made the change and when as well as user details such as name, user login, email address, custom links, Home page assignment, Table Wizard rights, and other details on the **Details** tab of the User page.
- **HIS\_UserRoles** - Contains the list of roles assigned to each user.

This data is only available in database tables; therefore, a familiarity with SQL Server Management Studio is necessary for accessing the data. Contact Sopheon Customer Support for additional information.

## Auditing System Access

Accolade maintains a record of every user attempt to log on to Accolade. Using the information in the user access logs, Administrators can determine which users are actively accessing Accolade and conduct general system security audits. The user access logs contain the following information and are saved according to the **Number of Days to Maintain User Access Logs** parameter setting:

- The date and time of the login attempt.
- The Windows ID of the user logging in.
- Whether each login attempt was successful.
- The Accolade user name and system ID of the user who successfully logged in.

- The IP address, the browser version, and operating system of the client machine.
- The client machine's language setting as accepted by the Accolade server.

To access the data about user log in history, design reports using the **RV\_UserAccessLog** and **RV\_UserAccessLastLogin** reporting views. See [Design Charts and Reports Overview](#).

## SQL Query Examples

The following are example SQL queries that you can use to create reports regarding user access to Accolade.

### SQL query to gather all user access log information:

```
SELECT * FROM RV_UserAccessLog
```

This query generates an HTML report similar to the following:

User Access Log - Comprehensive View							
LoginDate	UserLogin	UserID	Name	LoginResult	IPAddress	Language	UserAgent
2013 05 16 07:17:43	DEMO\jane doe	36	Jane Doe	Succeeded	192.168.101.99	en-US	Mozilla/5.0 (compatible; MSIE 9.0; Windows NT 6.1; WOW64; Trident/5.0)
2013 05 16 07:19:49	DEMO\jane doe	36	Jane Doe	Succeeded	192.168.101.99	en-US	Mozilla/5.0 (compatible; MSIE 9.0; Windows NT 6.1; WOW64; Trident/5.0)
2013 05 16 08:14:19	DEMO\jane doe	36	Jane Doe	Succeeded	192.168.101.99	en-US	Mozilla/5.0 (compatible; MSIE 9.0; Windows NT 6.1; WOW64; Trident/5.0)
2013 05 16 08:18:41	DEMO\jane doe	36	Jane Doe	Succeeded	192.168.101.99	en-US	Mozilla/5.0 (compatible; MSIE 9.0; Windows NT 6.1; WOW64; Trident/5.0)

### SQL query to gather the date of last attempted log in for each user:

```
SELECT UserLogin as Login, LastLoginDate as "Login Date" FROM RV_
UserAccessLastLogin order by LastLoginDate desc
```

This query generates an HTML report similar to the following:

Users by Most Recent Login	
Login	Login Date
DEMO\brenda majors	2014 03 26 11:42:17
DEMO\Administrator	2014 03 25 09:29:38
DEMO\jane doe	[None]

### SQL query to gather the users that have not attempted access in 6 months or more:

```
SELECT Name, UserLogin as Login, LastLoginDate as "Login Date"
FROM RV_UserAccessLastLogin
WHERE (LastLoginDate IS NULL OR CONVERT(DATETIME, REPLACE
(SUBSTRING
(LastLoginDate, 1, 10),',','')) < dateadd(month,-6,GetDate()))
)
order by LastLoginDate desc
```

This query generates an HTML report similar to the following:

Users not logged in for 6 months or more		
Name	Login	Login Date
Demo Administrator	DEMO\Administrator	[None]
Brenda Majors	DEMO\brenda majors	[None]
Jane Doe	DEMO\jane doe	[None]

## User Attributes Overview

After creating a user account, administrators also assign each user a set of attributes that defines the following:

- **Active Status** - Determines if the user account is active or deactivated.
- **Default Language** - Determines the language in which text within Accolade displays.
- **Date Format** - Determines the format, such as MM/dd/yyyy or dd/MM/yyyy in which dates display and are entered in Accolade.
- **User Roles** - Determines the portions of the application the user can see and what types of tasks he or she can complete in Accolade. The user role, like their login name and email address, belongs to the user regardless of which projects or access groups the user is assigned.
- **Rights to Additional Accolade Features** - Determines what permissions the user has when using Accolade Office Extensions for creating reports and spreadsheets, and for portfolio analysis using Accolade Portfolio Optimizer.
- **Access Groups and Security Settings** - Determines which projects, documents, and process models the user can view and/or edit.
- **Project Management Rights** - For the Process Manager and Idea Manager roles, determines the projects that the user has project management rights, such as the ability to delete a project, based on access group.
- **Email Notifications** - Identifies which events generate and send an automated email notification to the user.
- **Links to Additional Sites and Content** - Provides access to websites, FTP sites, email, or local intranet sites through additional menu options. Links defined here are user-specific. To define this type of link that is available for all users, or users assigned a specific role, see "[Adding Menu Items for Multiple Users \(Global Links\)](#)" on page 380.

Individual users can modify and add some details within their user profile, such as email notifications and subscribing to reports.

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**Important!** Prior to assigning attributes to user accounts, ensure that your company's access groups and security lists are defined.

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**Note:** You can also select multiple users and update them at once. To do this, select one, and press and hold your Shift key to select multiple in a row, or press and hold your Ctrl key and select multiple users from separate locations on the list. Then, click on the View Details icon, and all attributes related to the selected users will load.

If there is a tick in attribute check-boxes, all users share this attribute. If there is a blue box in attribute check-boxes, one or more users share this attribute, but not all. Updates done to any attributes here will apply to all users.

## Assigning General User Details

For each user account you create, assign general settings including whether the user account is active, receives confirmation messages for successful actions within Accolade, expires after a specific date, and the default display language and date format for the user.

Users can change settings for all general details except their user name, login, and active status within their own user profile.

### To assign general user settings:



1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing .
  3. Ensure the **General Details** tab is selected and specify the following information for the user:

Field	Description
<b>Language</b>	Select the language in which the application text displays. The default language is English.
<b>Date Format</b>	Select the display and entry format for dates. The default date format is MMM dd, yyyy (Feb 28, 2016).
<b>Expiration Date</b>	Enter the last date on which the user's account is active.



Field	Description
	<p>After this date, the user's account is automatically deactivated. Deactivated users are not removed from Accolade; however, they do not have access to any Accolade information.</p> <p>For example, you may set an expiration date if you require users to submit access requests on a yearly or more frequent basis, or if a user only requires temporary access to Accolade information.</p> <p> Use a spreadsheet file to import the expiration date for multiple users at once.</p>
<b>User Name</b>	<p>Update the user's name as you want it to display in Accolade.</p> <p><i>(Optional)</i> If the <b>Enable User Profile Images</b> system parameter is enabled, add a user profile image that displays with the user's name in various locations within Accolade, click  next to the user name, click <b>Choose Image</b>, navigate to and select the image to add, and click <b>Upload File</b>. To remove a profile image, click the image next to the user name and click <b>Remove</b>.</p> <p><b>Note:</b> To display as an image within Accolade, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, jfif, or .png.</p>
<b>Login</b>	<p>Update the login the user uses to access Accolade.</p> <p>Depending on how Accolade is installed, a user's login name could be the same as the login in their Windows domain account, or local machine account. For Windows Authentication, logins are <code>&lt;domain&gt;\&lt;login name&gt;</code> where <code>&lt;domain&gt;</code> is the network domain and <code>&lt;login name&gt;</code> is the login assigned to the user.</p> <p><b>Note:</b> You may consider keeping logins consistent, such as first initial and last name (jdoe) or first name.last name (jane.doe).</p>
<b>Email Address</b>	<p><i>(Optional)</i> Enter the user's corporate email address. Accolade uses this address for email notifications and for email links throughout the system.</p>

Field	Description
<b>Chat Address</b>	<i>(Optional)</i> Enter the user's address for your company's selected chat tool.
<b>Resource Pool</b>	<p><i>(Optional)</i> Select the resource pool to which the user belongs.</p> <p>Users are grouped into resource pools for resource planning purposes for assignments to projects.</p> <p><b>Note:</b> This field is only available if your company uses the resource planning components within Accolade and at least one resource pool is defined.</p>
<b>Show confirmation messages</b>	<p>Select this check box to enable or disable the display of confirmation messages as the user successfully completes actions within the system.</p> <p>Disabling this option does not disable the display of error messages.</p>
<b>Enable Auto Search on Project Creation</b>	<p>Select this check box to enable or disable an automatic search for projects with the same or similar names or descriptions when creating new projects.</p> <p>When enabled, Quick Search finds and displays existing projects that match the new project name or description. Use this feature to help discover if like-projects exist so Process Managers do not duplicate efforts when creating projects.</p>

4. Select the **Active** check box to [activate or deactivate](#) the user.
5. Click **Save** to save your changes.

**Notes:**

- User details, such as name, login, email, and chat, show for each user when editing multiple users.

## Assigning User Roles and Rights

User roles determine the portions of the application the user can see and what types of tasks the user can complete in Accolade. The user role belongs to the user regardless of which projects or access groups the user is assigned.

Rights determine what permissions the user has when creating Accolade online reports or reports with the Accolade Office Extensions add-in, and for portfolio analysis using Accolade Portfolio Optimizer.

- 💡 Use a spreadsheet file to import or update the roles and rights for multiple users at once.

### To assign roles and rights to one or more users:

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing.
  3. Select the **Roles and Rights** tab.
  4. Select the check boxes next to the roles to assign.
  5. In the Reporting Rights section, select the permissions to grant to this user when creating and viewing reports containing Accolade data in the Accolade Office Extensions add-in or Accolade online reports.
    - **None** - The user cannot create or refresh reports created using the add-in or online reports.
    - **Refresh Workbook Data** - The user can refresh to view the most current data in reports, but cannot create or modify the reports. This is the only option for users assigned only the Read Only role.
    - **All Rights** - The user has full permissions to create and refresh reports.
  6. In the **Portfolio Optimizer Rights** section, select the permissions to grant to this user in Portfolio Optimizer.

If a user has **Load Portfolio** rights, projects load as follows in Portfolio Optimizer:

- If a user has the Process Manager user role, all projects in access groups to which they have Manage Process rights are loaded when they select to load a portfolio.

They can choose to select the **Include All Projects I Can Access** option to load all projects that they have security access to, which may include projects they do not have Manage Process rights to.

- If a user *does not* have the Process Manager user role, or has the role without Manage Process rights, they must select the **Include All Projects I Can Access** option within Portfolio Optimizer when loading portfolio data. They can work with the data within Portfolio Optimizer; however, they cannot commit changes to projects in Accolade.
- If a Process Manager cannot load all the projects that have demand on a given resource pool, demand data for that pool is incomplete, preventing resource availability from being calculated accurately. To give managers complete demand data in Portfolio Optimizer, you can allow them to load all the projects that have demand on those pools using the check box and selecting all the pools. However, allowing managers to load projects over which they do not have Manage Process rights also enables them to reschedule resource demand and gate meeting dates in those projects using Portfolio Optimizer.

Users must have **Save Portfolio** rights, the Process Manager user role, and Manage Process rights in all projects that have changed to save changes made in Portfolio Optimizer back to Accolade.

See the *Portfolio Optimizer Online Help*, available within the Portfolio Optimizer application, for additional information.

7. In the **Additional Rights** section, select the **Allow Updates from My Work page** option to allow the user to update multiple projects at once using the download and upload feature for projects from the My Work page.

This setting applies only to Project Managers, Idea Managers, and Project Team Members.

8. Click **Save** to save your changes.

**Notes:**

- Accolade Portfolio Management and Portfolio Optimization are optional Accolade components that you may not have access to. To implement these solutions, contact Sopheon Customer Support.

## User Roles Reference

A user role is an attribute assigned within a user account that determines what pages the user can see and what tasks the user can complete within Accolade. A user role determines:

- The default Home page displayed when first entering Accolade. The default home pages listed in the descriptions below are the Home pages that display if only that role is assigned. Administrators and Process Designers have the ability to set different home

pages for different user roles using Global Links.

- The menus available in the menu bar.
- Tasks the user can complete.

**Note:** Role names within Accolade are configurable. The roles referred to throughout this documentation use the default role names provided in Accolade.

A user role *does not* determine which projects and documents users can see. That visibility depends on the user's place in the access groups hierarchy and on the user's security profile, if any.

**Process Execution Roles**

Several different types of managers have control over various objects such as projects, project gates, and reference tables, while other roles are necessary to participate in projects. Process execution roles include:

Role	Description
<b>Document Reviewer *</b>	<p>Document Reviewers review and edit deliverable documents through a structured process defined in a workflow. This role is required to assign someone as an action owner in a workflow process. This role is typically combined with other roles to allow users to review documents in addition to their other tasks.</p> <p>Document Reviewers can:</p> <ul style="list-style-type: none"> <li>• Be assigned to an action in a workflow.</li> <li>• Complete an action in a workflow.</li> <li>• Enter decisions in the details of a deliverable's workflow.</li> </ul> <p>Access groups control a Document Reviewer's access to deliverables.</p> <p>The Document Reviewer role exists only if your company has purchased the Collaborative Workflow features.</p> <p><b>Default Home Page:</b> All My Work</p>
<b>Executive</b>	<p>Executives monitor projects and serve as gatekeepers at gate meetings, and are typically upper-level management employees. Executives are people in the organization that make Go or No Go decisions throughout the Phase Gate process.</p> <p>Executives can:</p> <ul style="list-style-type: none"> <li>• Be assigned as a gatekeeper on a project.</li> <li>• View dates for upcoming gate meetings and view project information through Upcoming Gates.</li> </ul>

Role	Description
	<ul style="list-style-type: none"> <li>• Search for and view published documents.</li> <li>• Use discussions and email to communicate with other gatekeepers on a project.</li> <li>• View summaries and comparisons of project information using charts and reports.</li> </ul> <p>Executives cannot modify data in the system unless they are assigned a role that allows them to do so.</p> <p><b>Default Home Page:</b> Charts &amp; Reports</p>
<b>Gate Manager</b>	<p>Gate Managers oversee gate details and the creation and completion of gate documents. A user with the Gate Manager role receives the management rights over the data in a specific gate when assigned as the gate owner of that gate.</p> <p>Gate Managers can:</p> <ul style="list-style-type: none"> <li>• Be assigned as gate owners.</li> <li>• Manage gate details, upload gate documents, and change gatekeepers on gates they own.</li> </ul> <p><b>Default Home Page:</b> Upcoming Gates</p>
<b>Idea Manager *</b>	<p>Idea Managers filter submitted ideas and guide idea projects through the evaluation process. Idea Managers throughout your company may have different responsibilities depending on their management rights.</p> <p>Idea Managers with sufficient rights can:</p> <ul style="list-style-type: none"> <li>• Review new ideas and either begin work on the project, migrate, close, or delete the idea project.</li> <li>• Request that the idea submitter resubmit the idea, if necessary, and cancel resubmissions.</li> <li>• Update idea project details such as project name, project manager, and description.</li> <li>• Upload versions of unowned deliverables, activities, and gate documents.</li> <li>• Delete deliverables and activities that do not apply.</li> <li>• Update gate meeting details, change a gatekeeper for a gate meeting, enter gate meeting decisions, and upload gate documents for gates with no owner.</li> <li>• Act as the project manager or gate owner when an idea project or gate has no assigned owner.</li> </ul> <p>The Idea Manager role exists only if your company has purchased the Idea Submission or Accolade Idea Lab.</p> <p><b>Default Home Page:</b> All My Work</p>

Role	Description
<p><b>Process Manager</b></p>	<p>Process Managers guide projects through the Phase Gate process from project creation to staffing to deleting the project when it is complete. Process Managers throughout your company may have different responsibilities depending on their management rights.</p> <p>Process Managers with sufficient management rights can:</p> <ul style="list-style-type: none"> <li>• Create, edit, migrate, close, and delete projects.</li> <li>• Add and remove team members, including the project manager.</li> <li>• Update project details such as project name, description, and group.</li> <li>• Upload versions of unowned deliverables, activities, and gate documents.</li> <li>• Delete activities that do not apply.</li> <li>• Enter project status.</li> <li>• Set gate dates, enter gate meeting decision, and change a gatekeeper for a gate meeting.</li> <li>• Act as the project manager or gate owner when a project or gate has no assigned owner.</li> </ul> <p><b>Default Home Page:</b> Upcoming Gates</p>
<p><b>Project Manager</b></p>	<p>Project Managers oversee the completion of one or more projects. Process Managers assign Project Managers to projects when the project is created. Users assigned the Project Manager role can be assigned as a Project Manager to a project.</p> <p>When assigned to a project, Project Managers can do the following within that project:</p> <ul style="list-style-type: none"> <li>• Add team members (if the Project Manager has Manage Team rights)</li> <li>• Assign ownership of deliverables and activities.</li> <li>• Upload versions of unowned deliverables and activities.</li> <li>• Change the project name, description, and enter project status and metrics.</li> <li>• Maintain related documents.</li> <li>• Request resources.</li> </ul> <p>Project managers cannot:</p> <ul style="list-style-type: none"> <li>• Change the project manager or gate owners.</li> <li>• Enter gate details and results.</li> <li>• Create, close, or delete projects.</li> </ul>

Role	Description
	<p>Some members of a project team may have both the Project Team Member and Project Manager roles. However, if they are added to the project as a Project Team Member, they only have Team Member rights in that project.</p> <p><b>Default Home Page:</b> All My Work</p>
<p><b>Project Team Member</b></p>	<p>Project Team Members research and complete work on one more assigned projects.</p> <p>Team Members can:</p> <ul style="list-style-type: none"> <li>• Locate projects and assignments through All My Work.</li> <li>• View project information and communicate with other project members through the project pages.</li> <li>• Create and publish deliverable and activity versions for documents they own.</li> <li>• Assign activities for deliverables that they own to other members of the team.</li> <li>• Add related documents to the project.</li> <li>• Refresh charts and reports based on assigned rights.</li> <li>• View any project that is visible to them or to which they are assigned using Search.</li> </ul> <p><b>Default Home Page:</b> All My Work</p>

\* These roles are available with purchase of their respective features.

### Reduced Access Roles

Assign reduced access roles to users that need only visibility or limited rights to edit into one or more projects within your organization. Reduced access roles include:

Role	Description
<p><b>Restricted Team Member</b></p>	<p>Restricted Team Members work on deliverables or activities in projects. They are not able to see any project information other than the deliverables and activities they own, nor do they have permission to use reporting mechanisms. Assign this role to consultants or other outside experts (either outside the company or outside the project team) to produce a deliverable in a project without being given access to any other project information.</p> <p>Restricted Team Members can:</p> <ul style="list-style-type: none"> <li>• Locate and edit deliverables and activities assigned to them through All My Work.</li> <li>• Create and publish deliverable and activity versions for</li> </ul>



Role	Description
	<p>documents they own.</p> <ul style="list-style-type: none"> <li>• Enter time on timesheets if the company has purchased Time Tracking features. Restricted Team Members can only enter time on projects that contain the activities and deliverables they own.</li> </ul> <p><b>Default Home Page:</b> All My Work</p>
<b>Read Only</b>	<p>The Read Only role provides access for company staff who need to search for documents and information throughout the company, but do not have a need to update information.</p> <p>Read Only users can:</p> <ul style="list-style-type: none"> <li>• Browse, search for and view existing projects, activities, deliverables and published documents to which they have access group or security list access.</li> <li>• View charts and reports.</li> </ul> <p>This role does not have any editing or reporting functions, and is restricted from adding or editing projects, related data and documents, creating or printing reports, or viewing dashboards.</p> <hr/> <p><b>Important!</b> If a user who was previously not set to Read Only is assigned as the owner of any deliverables or activities, removing their other assigned roles and assigning them the Read Only role <i>does not</i> remove their access from the project or the ability to update project information by uploading new versions of the assigned documents. To ensure a user is truly Read Only, the assigned Project Manager must remove the user as the document owner from any assigned documents in the project.</p> <hr/> <p><b>Default Home Page:</b> Search</p>

**Administrative Roles**

Assign administrative roles to users that configure security, define how Accolade is configured, and design and maintain the development process for your company. Depending on your organization, you may have one or more people in these roles. In order to assign a user to an Administrative role, you must have Admin Of the root access group. Administrative roles include:

Role	Description
<b>Administrator</b>	<p>Administrators maintains Accolade users, access groups, templates, and configuration. Process Designers throughout your company may have different <a href="#">configuration rights</a>.</p> <p>Administrators with sufficient rights can:</p> <ul style="list-style-type: none"> <li>• Create, modify, deactivate, and remove Accolade user accounts.</li> <li>• Create, modify, and delete access groups.</li> <li>• Create queries, charts, reports, classes, link types, spreadsheet workbooks, reference tables, global links, workflows, quick grids, functional areas, functions, and configure Accolade parameters.</li> <li>• Create resource pools and assign resource pool owners.</li> <li>• Edit existing metric definitions.</li> <li>• Download, edit, delete, and add templates to the Template Library, when combined with the Template Access user role.</li> </ul> <p>Administrators cannot access projects unless they are assigned a role that allows them to do so. In order to be assigned Admin Of an access group, you must have the Administrator role. See <a href="#">"Granting Access Group Permissions to Users" on page 91</a></p> <p><b>Default Home Page:</b> User Administration</p>
<b>Process Designer</b>	<p>Process Designers manage the overall Phase Gate process of a company or division. Process Designers throughout your company may have different <a href="#">configuration rights</a>.</p> <p>Process Designers with sufficient rights can:</p> <ul style="list-style-type: none"> <li>• Create, modify, and delete models and migration maps.</li> <li>• Create, modify, and delete reference tables.</li> <li>• Create, modify, download, and delete templates in the Template Library, when combined with the Template Access user role.</li> <li>• Create queries, charts, reports, metrics, classes, link types, spreadsheet workbooks, reference tables, global links, workflows, quick grids, functional areas, functions, and configure Accolade parameters.</li> </ul> <p>Process Designers cannot access projects unless they are assigned a role that allows them to do so. See <a href="#">"Granting Access Group Permissions to Users" on page 91</a>.</p> <p><b>Default Home Page:</b> Models</p>

Role	Description
<b>Reference Table Manager</b>	<p>Reference Table Managers update reference table values using new versions of existing reference tables that they own. This role is assigned with other user roles.</p> <p>Reference Table Managers can:</p> <ul style="list-style-type: none"> <li>• Upload a new version of a reference table that they own.</li> <li>• Modify reference table details in tables that they own.</li> </ul> <p>Only Administrators and Process Designers can create and upload new reference tables. Users assigned the Reference Table Manager user role can be assigned as the table's owner and can update new versions of the tables they own.</p> <p><b>Default Home Page:</b> Reference Tables</p>
<b>Project Importer</b>	<p>Project Importers import data into Accolade from external files. Project Importers can import multiple projects, project links, matrices and related documents. Paired with the Process Designer role, the Project Importer can also import resource data including demands, pools, curves, and others.</p> <p>A user who imports projects may also need the Reference Table Manager role to edit the reference tables used in the import, and the Process Manager role, to confirm the results of the import.</p> <p><b>Default Home Page:</b> Imports</p>
<b>Service Account</b>	<p>The Service Account role is not intended for assignment to an actual Accolade user. Assign this role to the user account for the Accolade Autoloader Service, which uploads reference tables and related documents automatically from a designated drop box at a scheduled time. If Accolade is configured with Windows Authentication, this user account must also be a user account on the domain, although it does not have to be the account of an actual person.</p> <p>To ensure that reference tables assigned to a specific access group are uploaded successfully when enabled for automatic upload, assign the user with the System Service user role access to all access groups defined in the system. See <a href="#">"Granting Access Group Permissions to Users" on page 91</a>.</p>
<b>Data Analyst</b>	<p>The Data Analyst own the creation and maintenance of API keys that can access Accolade data to be used for queries and reporting.</p>
<b>IT Manager</b>	<p>The IT Manager has access to Advanced Administration. This role is generally given to IT or Administrative roles within a company.</p>

## Planner Roles

Assign one or more planner roles to update objects and views within Innovation Planning. These roles exist only if your company has purchased the Innovation Planning features. Planner roles include:

Role	Description
<b>Planner *</b>	<p>Planners develop and maintain innovation plans in Accolade Innovation Planning. Users with the Planner role can see the <b>Planning</b> menu and access the Innovation Planning application.</p> <p>The Planner role can be assigned with the Process Manager role to allow Planners to create planning elements. In addition, a Planner can also be a Project Team Member to allow assignment to planning element teams, and the Process Manager role that grants administrative privileges based on assigned management rights.</p> <p>A Planner's additional rights within Innovation Planning are defined through Accolade security lists and access group rights.</p> <p>If your company does not run Innovation Planning, but uses Accolade's integration with Microsoft Project, assign this role to users for access to the <a href="#">My Project Gantt view</a>.</p> <p><b>Default Home Page:</b> Planning Board</p>
<b>Planning View Designer *</b>	<p>Planning View Designers can share the planning views they create with other Planners by making the views public, and they can also update the settings in other public views to which they have access.</p> <p>Planning View Designers must also have the Planner role to access the <b>Planning</b> menu, and cannot change values within planning elements in a view unless they have the other user roles that allows them to do so.</p>

\* These roles are available with purchase of their respective features.

## Resource Planning Roles

Assign one or more resource planning roles to users that manage resource capacity and demand within your company. Combine these roles with other roles if a user has more than one role within your company. These roles exist only if your company has purchased the Resource Planning features. Resource planning roles include:

Role	Description
<b>Resource Planner *</b>	<p>Resource Planners maintain resource capacity levels for resources (both employee and material) throughout the company, and plan and assign the resources, personnel and material, that each project needs. They adjust resource assignments from stage to stage and balance resource requests against resource availability.</p> <p>Resource Planners can:</p> <ul style="list-style-type: none"> <li>• Enter resource demands for projects.</li> <li>• Apply demand curves to projects.</li> <li>• Add resources to an individual project and modify resource demand.</li> <li>• Adjust demand values in demand curves for resources in pools they own on the Demand Curve page.</li> <li>• Transfer a resource from pools they own pool to a different pool on the Edit Resource page.</li> </ul> <p><b>Default Home Page:</b> Resource Planning</p>
<b>Resource Pool Administrator *</b>	<p>Resource Pool Administrators create and maintain resource pools. Resource pools group your resources by geographical region, job function, or any other grouping that fits into your organization.</p> <p>Resource Pool Administrators can:</p> <ul style="list-style-type: none"> <li>• Create resource pools, add or remove members from a pool, and delete pools.</li> <li>• Assign pool owners.</li> <li>• Link pools together.</li> <li>• Create and edit demand curves.</li> </ul> <p><b>Default Home Page:</b> Pools</p>

\* These roles are available with purchase of their respective features.

### Time Tracking Roles

Assign time tracking roles to users participating in projects and managers needing to approve project time entries. These roles exist only if your company has purchased the Time Tracking feature. Time tracking roles include:

Role	Description
<b>Timesheet User *</b>	<p>Timesheet Users can access timesheets, which is where users can track their time against various projects within Accolade. This role can be the only role available to users who are required to log their time, but do not require access to additional information within Accolade.</p> <p>The Time Sheet Approver role exists only if your company has purchased the Time Tracking features.</p> <p><b>Default Home Page:</b> Timesheet Entry</p>
<b>Timesheet Approver *</b>	<p>Timesheet Approvers can access the Timesheet Approval page, where they can review timesheets for all employees who report to them. This role can be the only role assigned to users who are required to approve time worked, but do not require access to additional information within Accolade, or combined with any other role. Users with the Timesheet Approver role can be assigned as the timesheet approver for a resource pool. If combined with the Resource Pool Administrator user role, the timesheet approver can define and configure resource pools for time tracking purposes.</p> <p><b>Note:</b> Project Managers have access to approve time for projects they manage, without having the Timesheet Approver role.</p> <p><b>Default Home Page:</b> Timesheet Approval</p>

\* These roles are available with purchase of their respective features.

## General Roles

Assign general roles to enhance the ability of other user roles within Accolade. For example, allow managers to delegate responsibilities when they are on leave, or give the template access role to users configuring or designing processes to easily add or update templates. General roles include:

Role	Description
<b>Template Access</b>	<p>Template Access users can access the Template Library, which is where templates for documents created in your company are stored. This role is combined with other user roles, and the role combination determines what type of access the user has:</p> <ul style="list-style-type: none"> <li>Administrators and Process Designers with this role can view existing templates and add templates to the library. In addition, Administrators and Process Designers can create and modify Quick Grid and Workflow templates.</li> </ul>

Role	Description
	<ul style="list-style-type: none"> <li>Process Managers, Idea Managers, Project Managers, and Project Team Members with this role can view templates that are labeled as <b>Other</b>. These are typically templates that are not formatted or populated with any data types.</li> </ul> <p><b>Default Home Page:</b> N/A</p>
<p><b>Can Delegate Assignments</b></p>	<p>Users with this role are able to delegate their assignments to another user for a specific time period; for example, while they are out of the office. Delegating assignments helps to ensure that project work, including workflows, continues while a team member is unavailable.</p> <p>This role does not determine who is available to delegate assignments to. Assignments can be delegated to any user with the Project Manager, Idea Manager, Project Team Member, or Document Reviewer role.</p> <p><b>Default Home Page:</b> N/A</p>

**Granting Access Group Permissions to Users**

An access group is a container of projects, users, reference tables, and/or planning elements (in Accolade Innovation Planning) that enforces information security. Access groups restrict which process models, projects, reference tables, or planning elements users can see or find using search. See "[Designing the Access Group Hierarchy](#)" on page 25 for more information about planning the access groups for your company.

Assign each user account within your system to one or more access groups to grant access to the data available within that group.

**Note:** Selecting the top-level access group (i.e. Root) grants permission to all access groups in the tree. Additionally, selecting a parent within the tree structure grants permissions to all access groups within that tree.

**To assign permissions to an access group:**

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.


- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
- Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.

- Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing.
  3. Click the **Access Groups** tab.

The access groups display in the tree on the left. Use the check boxes to grant the user certain permissions within selected access groups.

**Note:** Selecting a parent access group in the tree structure automatically includes the child access groups, except for the Member Of column.

4. Define user admin rights for users with the Administrator role:

User Admin Right	Description
<b>Member Of</b>	<p>When checked, the user becomes a member of that particular access group.</p> <p> Users must be a <b>Member Of</b> at least one access group.</p>
<b>Admin Of</b>	<p>Only enabled if the user has the Administrator role checked on the Roles and Rights tab.</p> <p>Administrators are granted create/edit ability only within the access groups for which they have <b>Admin Of</b> checked. All other rows will be disabled.</p> <p>Users with the Administrator role must be the Admin Of at least 1 Access Group. Only a root level administrator can grant a user <b>Admin Of</b> rights if they are not already an Administrator (roles and rights).</p> <p>If multiple users are selected and the editor does not select <b>Admin Of</b> for ALL users, they will appear to be read only.</p>

5. Check the access group that the user belongs to for project access in the **Access** column.
6. Define project management rights for users with the Process Manager, Project Manager or Idea Manager user roles:




- The Project Manager role will be disabled if the user being edited has Manage Team checked in their Access Groups tab.
- The Process Manager and Idea Manager roles will be disabled if the user being edited has any of the following components checked in their Access Groups tab outside of the editors Admin Of groups.
  - Manage Team
  - Manage Process
  - Migrate Project
  - Add Project
  - Delete Project
  - Delete Activity
- Only Administrators at the highest level of the Access Group hierarchy (Root) can Create/Edit/Remove the following roles on the Roles and Rights tab:
  - Administrator
  - Process Designer
  - Service Account

**Note:** When creating a new user through **Copy From**, the same access group logic applies. Access group permissions will apply based on the administration permissions of the user creating the user profile. Administrator, Process Designer, and Service Account roles will not be copied over unless the editor is a root level Administrator.

Management Right	Description
<b>Manage Team</b>	<p>The ability to edit the members of a team. Your company may have highly sensitive data and projects that require restriction around who can be assigned to the project. Use this option to define which Project Managers and Process Managers within your organization have the ability to add team members to their projects and change project team leaders.</p> <p>For example, if you are developing products in other countries, or developing products or services that require specific security clearance, it becomes increasingly important to manage the team based on location or specific security credentials. You want to ensure that once a team is set for the product, team members who do not meet the criteria for working on the project are not added.</p> <ul style="list-style-type: none"> <li>• Users with the Project Manager user role do not</li> </ul>

Management Right	Description
	<p>require Manage Team rights at the access group level to manage a team:</p> <ul style="list-style-type: none"> <li>Use the <b>Project Manager can manage team</b> option when assigning a Project Manager to indicate that the user assigned as the Project Manager can add, remove, or replace members on the project's team. If a Project Manager user does have Manage Team rights at the access group level, you can override their Manage Team rights for a single project on project creation, migration, import, and when changing the Project Manager on the team.</li> <li>Users with a Process Designer role can only select a class for the model that is within the same Access Group branch.</li> </ul>
<b>Manage Process</b>	The ability to assign gate owners and project managers, add team members to upload documents without a document owner and to enter metric values. As a best practice, only one user should have Manage Process rights for a project. Keeping Manage Process rights separate helps to prevent accidentally overwriting another user's changes.
<b>Add</b>	The ability to add a new project using an existing class and model.
<b>Migrate</b>	The ability to migrate or copy a project to a different process model.
<b>Delete</b>	The ability to delete a closed project from the system.
<b>Delete Activity</b>	The ability to delete activities that do not apply from within projects.

7. Define configuration permissions for users with the Administrator or Process Designer user role:


Configuration Rights	Description
<b>Edit</b>	<p>The ability to edit configuration components. Your organization may be structured to have multiple Administrators or Process Designers in different branches. Restrict users to edit only the configuration components relevant to their branch of the organization.</p> <p> View is automatically checked when Edit is selected.</p>

Configuration Rights	Description
<b>View</b>	The ability to view configuration components. Your organization may be structured to have multiple Administrators or Process Designers in different branches. When you grant users View access only, configuration components such as process models, gate documents, and deliverables and activities will display as read-only.

8. *(Optional)* Define the Security permissions via the **Security Lists** or **Security Profiles** tabs.
  - Security Lists provide a regional list.
  - Security Profiles provide a list of access for Class and Metrics to choose from for a user account.
9. Click **Save** to save your changes.

## Adding User-Specific Menu Items

User links provide access to websites, FTP sites, email, local intranet sites, or files available on your network through an additional Accolade menu available to individual users. Administrators can define up to five links for each user.

-  To define a link that is available for all users, or users assigned a specific role, see ["Adding Menu Items for Multiple Users \(Global Links\)"](#) on page 380.

User-specific links display under the **My Links** menu, which is only available if the user account has a user-specific link defined, or if a global link is defined to display in that menu.

### To create a user link for one or more users:

1. From the **System** menu, select **Security & Groups > User Admin**.
  - To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.
    - Selecting a **Function** in the drop-down will display available users that are assigned to the function.
    - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
    - Click **More options** check box displays or hides the additional filter options.
    - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
      - **Active Users Only** - excludes inactive users.
      - **Show All Users** - displays active and inactive users.

- **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing.
  3. Select the **User Links** tab.
  4. In the **Title** field, click **None** and enter the name of the link, up to 64 characters in length, as you want it to display.
  5. In the **Link** field, select the link type to create:
    - **http** or **https** - A URL to a Web page or secure Web page. The **Disable Link to Website** system parameter settings determines if you can link to Web page.
    - **ftp** - A link to an FTP download site.
    - **file** - A link to a file or executable on your company's intranet. The **Disable Link to File** system parameter setting determines if you can link to a file.
    - **qvp** - A link to a Qlik application file. The **Disable Link to File** system parameter setting determines if you can link to a file.
    - **mailto** - Opens the user's email application and displays a blank email addressed to this email address.
    - **callto** - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat.
  6. In the adjacent field, enter the path to complete the link address.  
For example, if you select **http://** from the **Link** field, enter the remainder of the web site address, `www.google.com`.
  7. Click **Save** to save your changes.

**Notes:**

- To delete a user-specific link, clear the information entered in all the fields for the link and click **Save**.

## Assigning Custom Details to Users

If [extended fields](#) are set as active for users, an **Extended Fields** section displays for each user record defined within Accolade. Use these fields to assign custom details, such as department information, to each user. How extended fields are used, and whether they are required for users, is specific to your company.

- 💡 The **Extended Fields** section is disabled if multiple users are selected to modify. To assign extended fields to multiple users at once, use a spreadsheet file to import the extended field settings.

**To assign an extended field values to a user:**

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing .
  3. Select the **Extended Fields** tab.
  4. Enter the custom information as needed for each user.
  5. Click **Save** to save your changes.

**Notes:**

- Use the **User Details** column set in the **Users** subject within Accolade Office Extensions and Accolade Online Reporting to report on extended fields assigned to users.

## Setting User Email Notifications for System Events

You can configure most users to receive an email notification when Accolade events occur, such as activity and deliverable deadlines. Email notifications about system events allow users to receive notification of changes in the system or upcoming events, without having to login to Accolade to check the status of their projects. You can select to notify users about events immediately or on specific days each week.

Notifications are not distributed to all users. See "[Email Notification Distribution Reference](#)" on [page 99](#).



### To set email notifications for one or more user:

1. From the **System** menu, select **Security & Groups > User Admin**.

To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field by selecting one or more of the following options and clicking **Search**.

- Selecting a **Function** in the drop-down will display available users that are assigned to the function.
  - Select a **Group By** option to arrange the user list by roles, functions, resource pools, or access groups.
  - Click **More options** check box displays or hides the additional filter options.
  - In the **Active/Inactive** drop-down, select to filter users by active and inactive status from the following options:
    - **Active Users Only** - excludes inactive users.
    - **Show All Users** - displays active and inactive users.
    - **Inactive Users** - displays only users marked as inactive. Inactive status is indicated with *grey italics*.
  - In the **Roles** drop-down, select a specific role to apply to filter the user list.
2. In the **Users** list, click the name of the user to open the user details for editing .
  3. Select the **Email Notifications** tab.
  4. Select when to send emails to the users:
    - **To provide the users with scheduled emails** - Select one or more days of the week in the **Send me emails every** row and one or more events in the **On Selected Days** column. Emails are sent at midnight before the selected days and include a report about the selected events. You must select at least one day of the week and at least one event in the **On Selected Days** column for the report to send.
    - **To provide the users with immediate notifications** - Select one or more check boxes in the **Immediately** column.

It is possible to send both an immediate notification and a scheduled notification about the same event.

 If you are modifying settings for multiple users, some settings may be different for different users in the group. Check boxes with different values display with a blue filled in center . Click the check box once to clear it for all users and a second time to select it for all users.

5. To limit the stages for which assignment notifications are sent, select one or more stage selections in the **Send notifications for assignments in** options.  
For example, if your deliverable and activity owners only want to receive notifications for their assignments in the current stage of a project, select **Current Stage** and ensure the **Past Stages** and **Future Stages** options are cleared.
6. At the bottom of the event list, select whether to send emails in either plain text or HTML format.
7. Click **Save** to save your changes.

**Notes:**

- The **Number of days before...is due** events occur at midnight before the relevant day, and any immediate notifications for them are sent out then. The events for the late notifications, such as **Deliverable is late**, occur at midnight after the relevant day, and any “immediate” notifications are sent out then.
- Set users with the Document Reviewer user role to receive a notification that a deliverable is ready for their review, as that notification alerts them that their workflow action has started.
- Emails to users set as Restricted Team Members do not contain any project links that emails to other roles or assignments because of a Restricted Team Member's limited navigation ability within Accolade.

### Email Notification Distribution Reference

The following table shows which assignment types and roles receive notifications for Accolade events that generate an automated email. To receive a notification, you must be subscribed to an event.

In general, notifications about events are sent to members of the project in which the event occurred. However, the "Project created" notification is sent to all users who can see the project. Process Managers and Process Designers receive emails regarding all projects within their access group visibility.

Accolade Event	Email Recipients
<b>Days Before Defined Date</b>	
# days before activity deadline	Activity Owner, Deliverable Owner

Accolade Event	Email Recipients
# days before activity dependent finish date	Activity Owner, Deliverable Owner
# days before activity dependent start date	Activity Owner, Deliverable Owner
# days before activity finish date	Activity Owner, Deliverable Owner
# days before deliverable deadline	Deliverable Owner, Project Manager
# days before deliverable dependent finish date	Deliverable Owner, Project Manager
# days before deliverable dependent start date	Deliverable Owner, Project Manager
# days before deliverable finish date	Deliverable Owner, Project Manager
# days before MS Project task deadline	MS Project Task Owner
<b>Activity Events</b>	
Activity deadline changes	Activity Owner, Deliverable Owner
Activity finish date changes	Activity Owner, Deliverable Owner
Activity finish date is past the gate date	Activity Owner, Project Manager
Activity is completed	Deliverable Owner
Activity is in trouble	Deliverable Owner
Activity is late	Activity Owner, Deliverable Owner
Activity is ready to finish	Activity Owner
Activity is ready to start	Activity Owner
Activity is past finish date	Activity Owner, Deliverable Owner
Activity is ready for your review	Document Reviewer
Activity is approved by a reviewer	Activity Owner, Deliverable Owner, Project Manager
Activity is rejected by a reviewer	Activity Owner, Deliverable Owner, Project Manager
Activity review is declined by a reviewer	Activity Owner, Deliverable Owner, Project Manager
Another reviewer creates a new activity version	Reviewers assigned to the workflow step



Accolade Event	Email Recipients
Activity review is late	Activity Owner, Deliverable Owner, Project Manager, Reviewer
Activity owner changes	New Activity Owner, Deliverable Owner
<b>Deliverable Events</b>	
Deliverable deadline changes	Deliverable Owner, Project Manager
Deliverable finish date changes	Deliverable Owner, Project Manager
Deliverable finish date is past the gate date	Deliverable Owner, Project Manager
Deliverable is completed	Project Manager
Deliverable is in trouble	Project Manager
Deliverable is late	Deliverable Owner, Project Manager
Deliverable is ready to finish	Deliverable Owner
Deliverable is ready to start	Deliverable Owner
Deliverable is past finish date	Deliverable Owner, Project Manager
Deliverable is ready for your review	Document Reviewer
Deliverable is approved by a review	Deliverable Owner, Project Manager
Deliverable is rejected by reviewer	Deliverable Owner, Project Manager
Deliverable review is declined by a reviewer	Deliverable Owner, Project Manager
Another reviewer creates a new deliverable version	Reviewers assigned to the workflow step
Deliverable review is late	Deliverable Owner, Project Manager, Reviewer
Deliverable owner changes	New Deliverable Owner, Project Manager
<b>Gate and Gate Decision Events</b>	
All deliverables are ready for gate meeting	Gatekeepers for the gate, Gate Owners, Project Manager, Process Managers.
Gate changes	Gatekeeper, Gate Owner, Project Manager
Gate decision awaits approval	Gatekeeper, Gate Owner, Project Manager
Gate decision occurs	Project Gatekeepers, Gate Owner, Idea

Accolade Event	Email Recipients
	Submitter, Project Manager, Idea Manager, and Team Members assigned to the project,
Gate decision has been approved	Gatekeeper, Gate Owner, Project Manager
Gate decision has been rejected	Gatekeeper, Gate Owner, Project Manager
Gate owner changes	New Gate Owner, Project Gate Owners, current Project Gatekeepers, Project Manager, Idea Manager, and Team Members assigned to the project
Gatekeeper approves a decision	Gatekeeper, Gate Owner, Project Manager
Gatekeeper rejects a decision	Gatekeeper, Gate Owner, Project Manager
Gatekeeper decision has been skipped	Gatekeeper that was skipped, Gate Owner, Project Manager
Gatekeeper changes	New Gatekeeper, Project Gatekeepers, Gatekeeper, Project Manager, Idea Manager, and Team Members assigned to the project
<b>Project Status Events</b>	
Project is created	Any Executive, Gate Owner (of first gate), Idea Manager, Project Manager, Process Manager, Resource Planner, and Team Members who can see the project
Project is created through copy or migration	Any Executive, Gate Owner (of first gate), Idea Manager, Project Manager, Process Manager, Resource Planner, and Team Members who can see the project.
Project Manager Changes	New Project Manager, Project Gatekeepers, Gate Owner, Process Manager, Project Manager, Idea Manager, and Team Members assigned to the project
Project status report is added to one of my projects	Project Gatekeepers, Process Managers, Project Manager, Idea Manager, and Team Members assigned to the project
Project status report is added to any project	All Executives, Idea Managers, Project Managers, Process Managers, and Team Members and who can see the project

Accolade Event	Email Recipients
Project discussion is started or a comment added	Team Members, Project Manager, Idea Managers assigned to the project
One of my projects is in trouble	Project Gatekeepers, Gate Owners, Process Managers, Project Manager, Idea Manager, and Team Members assigned to the project
Any project is in trouble	All Executives, Idea Managers, Project Managers, Team Members, and Process Managers who can see the project
<b>Team Member Events</b>	
Team member is added	Team Members, Project Manager, Idea Managers assigned to the project
Team member is removed	Team Members, Project Manager, Idea Managers assigned to the project
<b>Workflow Events</b>	
Workflow is canceled for an activity	Activity Owner, Deliverable Owner, Project Manager, Reviewer
Workflow is complete and activity is approved	Activity Owner, Deliverable Owner, Project Manager
Workflow is complete and activity is rejected	Activity Owner, Deliverable Owner, Project Manager
Workflow is canceled for a deliverable	Deliverable Owner, Project Manager, Reviewer
Workflow is complete and deliverable is approved	Deliverable Owner, Project Manager
Workflow is completed and deliverable is rejected	Deliverable Owner, Project Manager
<b>MS Project Events</b>	
MS Project task deadline changes	MS Project Task Owner
MS Project task is completed	MS Project Task Owner, Project Manager
MS Project task is in trouble	MS Project Task Owner, Project Manager
MS Project task is late	MS Project Task Owner, Project Manager

Accolade Event	Email Recipients
MS Project task owner changes	New MS Project Task Owner
<b>Resource Demand Events</b>	
A resource is assigned to a project I own	Project Manager
An assigned resource is removed from a project I own	Project Manager
A requested resource is removed from a project I own	Project Manager
I am assigned as a resource demand	User resource
I am removed as a resource demand	User resource
A resource is requested	Resource Pool Owner
A resource request is removed	Resource Pool Owner
Resource demands change for a pool I own	Resource Pool Owner
<b>Reporting Events</b>	
Report scheduled to export fails	Report Owner

**Notes:**

- Idea Submitters can subscribe to Gate Decision Occurs events by selecting the **Notify Me** check box when submitting an idea.
- HTML reports are sent to users subscribed to the report

## Synchronizing Users with Active Directory Overview

**Note:** The information in this section assumes that you have a working knowledge of Active Directory and how it is setup and defined at your company.

If your company uses Microsoft's Active Directory for user authentication and administration, you can synchronize the user accounts defined in Accolade to those defined in your Active Directory server. Synchronizing the user data between your Active Directory and Accolade allows you to maintain user data such as email addresses and user names in the Active Directory without having to maintain the information in multiple locations. If you disable users in the Active Directory those users are deactivated within Accolade when the synchronization runs. However, you cannot activate users in Accolade using Active Directory.

- 💡 Synchronize additional data from your Active Directory users to user accounts in Accolade using extended fields. See ["Adding Custom Details Throughout Accolade" on page 396](#)

A service runs once an hour to synchronize the data from Active Directory to Accolade.



#### Example

If an employee changes their name or their login information changes, if you synchronize user data with Active Directory, you need only to make the changes within Active directory. An Accolade service runs in the background that keeps the information synchronized with the user information mapped in Accolade.

In addition, when you create user accounts in Accolade, you can search Active Directory for users and pull the user information directly from Active Directory into the user profile within Accolade.


After the **Active Directory Enabled** parameter is set in the Administration Console, continue with the following sections to map the server and create accounts.

## Mapping the Active Directory Server

To synchronize users with Active Directory, you must first tell Accolade where to find the Active Directory instance, and then map attributes available within Active Directory used to identify users.

- 💡 To sync users between Accolade and the Active Directory at any time, click **Sync** on the Active Directory page. A synchronization service runs in the background once an hour.

### To add an Active Directory and define the server information:

1. Ensure that the **Active Directory Enabled** system parameter is set to **1** in the Administration Console.  
The functionality is disabled by default.
2. Within Accolade, from the **System** menu, select **System > Active Directory**.
3. Do one of the following:
  - **To add a new Active Directory** - Click  in the lower left corner of the page.
  - **To edit an existing Active Directory** - Click inside the field that you want to edit.
4. Enter the following information:

Field	Description
<b>Display Name</b>	Enter the name of the server, as it displays in the Active Directory page.

Field	Description
<b>System Name</b>	<p>Enter a unique identifier for the Active Directory for within Accolade, for example, companyNameAD.</p> <p>The system name is not displayed to users and can be abbreviated to make it easy to use in queries.</p> <p>The system name must be unique and can include only letters (English alphabet), numbers, and the underscore.</p>
<b>URL</b>	<p>Enter the path to the Active Directory in your network using LDAP syntax.</p> <p>LDAP is case sensitive, and the URL must contain a forward slash after the port to be valid. For example: LDAP://server1.sopheon.com:389/.</p>
<b>Search Distinguished Name</b>	<p>Enter the attributes separated by commas that make up the distinguished name in Active Directory that defines users.</p> <p>For example: OU=Sopheon Users, DC=Sopheon, DC=com. This example includes the organizationUnitName and domainComponent attributes.</p> <p>The distinguished name is set of attributes you have chosen to identify users.</p>

5. Click **Apply** to save your changes.
6. Continue with the next procedure to complete the required mapping to active directory attributes.

#### To map Accolade fields to objects in the Active Directory structure:

1. Ensure that the **Active Directory Enabled** parameter is set to **1** in the Administration Console.
2. Within Accolade, from the **System** menu, select **System > Active Directory**.
3. Click the plus next to the Active Directory server you want to map.
4. In the **Row Value** column, enter the attribute name from Active Directory that corresponds to each **Row Label**. The mapping created using these fields determines which attributes are matched to map users between Accolade and the Active Directory.

**Note:** The **Domain** option is an actual value that is used to create the user login and is not a mapping option. It is concatenated with the **Row Value** for **Login** to create the user login.

5. Any extended field that has the **AD Sync** check box selected is also available to map data to from Active Directory. Map those fields, as necessary.
6. Click **Apply** to save your changes.

**Notes:**

- To sync Active Directory with Accolade, the user must have at least read-only rights to the configured domains on the server and be an Accolade user with the Service Account role.


## Creating User Accounts from Active Directory

When you add a user using Active Directory, Accolade imports the user information such as the user's name and email address from the Active Directory objects you indicated when you [mapped the Active Directory server](#) to fields within Accolade.

Prior to creating users in Accolade using Active Directory:


- Define the users within the Active Directory. After Active Directory is enabled in Accolade, you can only add user accounts that are defined within Active Directory.
- Create and map the Active Directory server within Accolade.

### To add a user account from Active Directory:

1. From the **System** menu, select **Security & Groups > User Admin**.  
The current list of users displays.
2. Click  to display the Add New User dialog box.
3. In the **Server** field, select the Active Directory in which you want to search for the user.  
To search all servers you have defined, select **All**.
4. Enter any or all of the following as it exists in the Active Directory and click **Search** to search the domain for the user:

Field	Description
<b>User Email Contacts</b>	Enter any part of the user's corporate email address.
<b>User Login Name Contains</b>	Enter any part of the name the user uses to log on to your network.
<b>User Name Contains</b>	Enter any part of the user's user name.

Users matching the information you entered display in the **Select a User** list.

5. Select the user in the list to add.
6. In the **Chat Address** field, enter the user's address for your selected chat tool.  
This can be the same or different than the user's standard email address.
7. *(Optional)* If the **Enable User Profile Images** system parameter is enabled, add a user profile image that displays along with the user's name in various locations within Accolade, click  next to the user name, click **Choose Image**, navigate to and select the image to add, and click **Upload Image**. To remove a profile image, click the image next to the user name and click **Remove**.  
To display as an image within Accolade, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, .jfif, or .png.
8. *(Optional)* In the **Copy From User** field, select the user whose configuration details you want to copy to this user.



Copying configuration details from existing users allows you to assign most of the details automatically, and only make a few changes to the user, and helps to ensure that users that you want to have the same permissions are set up identically. For example, you may have a set of Process Managers in your organizations that all receive the same configuration. Create one, and then copy the configuration to all others.

9. Click **Create** to create the user account.

**Notes:**

- The users that exist in Accolade prior to enabling Active Directory and running a sync are not removed from Accolade if they do not exist in the Active Directory when a sync runs.
- After Active Directory is enabled, you cannot change the values in the fields for any user within Accolade, such as the users email address.
- To import users, disable Active Directory, run the import, and then re-enable the Active Directory functionality.

## Synchronizing Users with Slack Integration

To synchronize users with Slack, you must first have configurations set in Slack and a valid token provided by Slack. The Slack bot token is needed when setting the Slack integration in Accolade. If a Slack user identification changes, you can resynchronize a user.

When configuring the Slack integration in Accolade, note the following:

- The token field is required.
- If the Slack token is changed, the integration will not work and needs to be updated in Accolade.
- When populating the chat address in Accolade, use the Slack prefix with user ID. All Slack user IDs need to have the Slack prefix. For example: SLACK:A1B2
- Accolade and Slack email addresses need to be the same.

**To resynchronize a user:**

1. In Accolade, from the **System** menu, select **Security & Groups > User Admin**.
2. Select the user from the list.
3. In the **General Details** tab, add the email address and the chat address.
4. Click **Save**.

## Company Functions Overview

A function is a label that helps identify the type of specialist within your company who should own a deliverable, activity, workflow action, or gatekeeper position in a project. Within process models, Process Designers can select a function to identify the default functional owner of deliverables, activities, workflow actions, or gatekeeper positions that make up the model. When defining a project team within a project, the Project Manager or a Process Manager can select which user assigned to the function is a member of the project. That user is automatically assigned to all the documents that have that function assigned in the project, streamlining the assignment creation process.

Functional areas serve as categories to sort functions into logical groups and typically reflect departments within your company: Engineering, Marketing, Manufacturing, and so on. Functional areas can be as large or as granular as what fits your company's needs. Functions typically reflect job titles or positions that fall within a functional area. For example, a functional area of Engineering could have functions defined for Electrical Engineer, Mechanical Engineer, and Chemical Engineer.

**Note:** Although functional areas and functions typically reflect departments and job titles or positions within your company, you can use them to identify users in other classifications.



### Example

Company A has a functional area defined for Operations, which includes members of its purchasing department. Within the Operations functional area, there is a function defined called Purchasing Leader.

Functions

▲ Name  
▼ Operations

Name

Purchasing Leader

+ Add Function

Company A requires Purchasing Leaders to gather Non-Disclosure Agreements (NDAs) from parts vendors during the first phase of any project that requires manufacturing. A Process Designer defines a process model to use for manufacturing projects that contains a deliverable in the first stage called Vendor-NDA. The Vendor-NDA deliverable indicates the Purchasing Leader as the function assigned.

Within a project based on the process model, the Process Manager or Project Manager assigned to the project can select the employee assigned to the Purchasing Leader function to add to the project team. Within the deliverable assignments for the Vendor-NDAs with the project, the user list now includes the team member selected for the Purchasing Leader function as owner of that deliverable.

## Creating Functional Areas and Functions

Functions and functional areas help identify the type of specialist within your company that owns a deliverable, activity, workflow action, or gatekeeper position in a project. A function typically identifies users by the user's job title or position within a functional area; however, you can use them to categorize users as you see fit for your company.

### To create a functional area:

1. From the **System** menu, select **Security & Groups > Functions**.
2. Do one of the following:
  - **To add a new functional area** - Click **Add Functional Area** in the lower right corner of the page.
  - **To edit an existing functional area** - Click the field within the area that you want to edit.
3. Complete the following information:


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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the functional area.
<b>System Name</b>	Enter a unique, shorter name that identifies the functional area in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among functional areas and can contain only letters (English alphabet), numbers, and the underscore.
<b>Order</b>	Click on the arrows near the area's name to adjust its order.  The areas will display in other locations in the same order that you arrange them on this page.

4. Click **Apply** to save your changes.


**To create a function within a functional area:**

1. From the **System** menu, select **Security & Groups > Functions**.
2. Click **Add Function** in the lower left corner of any functional area and complete the following information:

Field	Description
<b>Name</b>	Enter a name that identifies the function.
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the function in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among functions and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Functional Area</b>	<p>Select the functional area in which this function is categorized.</p> <p>For example, if you are creating a function for Mechanical Engineer, the functional area might be Engineering.</p>
<b>Order</b>	<p>Enter a number to specify the function's place when it displays within a list of functions.</p> <p>Lower numbered functions display higher in the list. This also determines the order of functions listed for a project team on the project's Team page.</p> <p>If no order is specified, the function is added to the top of the list within the assigned functional area.</p>
<b>Members</b>	<p>Click  to select the user(s) to assign to this function.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p>Highlight the user name(s) in the Available Users window and click <b>Select</b>, or double-click each user's name to move them from the <b>Available</b> list to the <b>Selected</b> list.</p>

3. Select the **Active** check box when the function is ready to use in projects.
4. Click **Apply** to save your changes.

**Notes:**

- To delete a function, click the  at the end of the function's row, and click **Apply** to save your change. If the function is in use, you can select the function that replaces the one you are deleting when prompted to move the users into the selected function. Select **None** to manually move users to a different function and manually modify document assignments, as necessary.
- To delete a functional area, click **Delete Functional Area** on the upper right corner of a functional area. Any functions within the functional area are moved to the Default functional area when you confirm the deletion.

## Merging Functions Together

If you find that you have duplicate or unnecessary job functions, merge the users from one function into another function. After the users are merged into one function, the system deletes the original function.

### To merge a function into another function:

1. From the **System** menu, select **Security & Groups > Functions**.  
The current list of functions displays both by display name and system name.
2. Select the check boxes in the **Merge** column next to one or more functions that you want to merge.
3. Select one check box in the **Merge To** column to identify the function that you want to merge the other functions into.
4. Click **Apply** to merge the users in the merge from function to the merge to function.  
The functions selected to merge *from* are removed from Accolade.

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## Chapter 2

# Defining Data Points and Gathering Methods

Accolade offers several methods to gather data about projects and current progress towards completion. Use the information in this chapter to define the components used to gather information from Accolade.

- [Metrics](#)
- [Matrices](#)
- [Quick Grids](#)
- [Templates](#)
- [Portfolio Snapshots](#)

## Metrics to Collect Project Data Overview

A metric is a measure of an aspect of a project, or product, and is unique to each company that implements Accolade. Metrics provide data and status and are available for inclusion in online forms, charts, reports, documents, and other places within Accolade. Use metrics to capture data, such as dates relative to project start and end dates, level of risk, or financial data such as project costs. Each company has their own set of data points that are important to their particular process flow. Use the various metric types to define and capture data points about all projects in your system.

Process Designers create and define metrics and assign metrics to process models, which then are available to projects based on those models. From there, Project Managers can assign values within their projects, and document owners can update deliverables, or activities within the project. A metric must be active and assigned to a model to be available for use within projects based on that model.

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**Important!** Administrators can view existing metric definitions, but cannot add or modify metrics.

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Accolade offers metric data types for entering text strings, dates, numbers, and single or multiple selection lists. The type of data captured in each metric determines the data type required for the metric, and the settings available to the metric.

In addition, increase the power and flexibility of metrics using the following:

- **Calculated Metrics** - The value of a calculated metric is defined [using an expression within the metric definition](#). Typically, this metric type is based on the values of one or more metrics, which can themselves be calculated metrics. Valid expressions are comprised of field codes and valid operators and functions.
- **Cascading List Metrics** - Cascading list metrics display different groups of list items depending on a value selected in a different metric or in other project data. Use queries within the metric definition to [define the list constraints](#).
- **Inherited Metrics** - Inherited metrics display metric values that are defined in linked projects, typically in a collection of projects called a portfolio. Inherited metrics are defined using the **Inherited Metric** check box when [creating the metric](#).
- **Filter Metrics** - Filter metrics describe attributes of a project, such as the project type, and are used in searches and on various project access pages to narrow the project list. Filter metrics are defined using the **Filter Metric** check box when [creating a metric](#).
- **Matrix Metrics** - Matrix metrics are metrics that are grouped together in a matrix, which is intended to model complex relationships between different data types. Matrix metrics are defined using the **Available to Matrix** check box when [creating a metric](#).
- **Searchable Metrics** - Searchability is available for metrics and matrix metrics.

Each of the above is defined as part of the basic metric setup.



## Creating Metrics

Metrics vary widely based on the type of information required at your company. The procedure below discusses how to create the *basis for any metric*.


Planners can also create metrics when defining a planning element in Accolade Innovation Planning. Metrics created in Innovation Planning contain a subset of options that are applicable to metric usage in Innovation Planning.


### To create a metric:

1. From the **System** menu, select **Content Sources > Metrics**.

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

2. Do one of the following:

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

 To copy a metric, the user must have "Can Edit" for at least one access group in the system and "Can View" for at least one access group on the metric. If you "Can Edit" any of the access groups the metric belongs to, the copy will have those groups. If you do not have "Can Edit" on any of the metric's access groups, the copy inherits your highest access group you can edit.


3. Complete the following information to identify and describe the metric:




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


Field	Description
<b>Display Name</b>	Enter a name, up to 64 characters long, which identifies the metric.
<b>System Name</b>	Enter a unique, shorter name that identifies the metric in queries, reporting views, Accolade Office Extensions add-in, Accolade online reports, and field codes, and other areas in Accolade.  The name must be unique among metrics and can contain only letters (English alphabet), numbers, and the underscore.  <b>Note:</b> Modifying system names of existing metrics is not recommended. If you modify an existing system name, you must also update the name in each query, report, template, and so on that references the metric.
<b>Description</b>	Enter a description of the purpose or nature of the metric.

Field	Description
	This description helps other users identify the metric throughout the system.
<b>Category</b>	<p>Enter or select the group to which this metric belongs.</p> <p>Use categories to organize like metrics together. For example, if there is a large number of metrics assigned to a process model, a Project Manager can use a category selection to locate metrics within their projects.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Order</b>	Enter a number to specify the metric's place when it displays in a list of metrics. Lower numbered metrics display higher in the list.

4. Select one or more of the "Available to" options to make the metric available in other portions of Accolade.



Option	Description
<b>Available to Business Intelligence Tools</b>	<p>Select this check box to enable the metric for use in your organization's business intelligence application.</p> <p><b>Note:</b> If the <b>Available to Planning</b> check box is selected, the <b>Available to Business Intelligence Tools</b> and <b>Available to Reporting</b> options will be automatically added to the metric settings when the metric is created.</p> <p> If the metric is selected for inclusion in a portfolio snapshot, you cannot clear this option.</p>
<b>Available to Matrix</b>	<p>Select this check box to enable the metric for use in matrices.</p> <p><b>Important!</b> A metric that is available to matrices can only be used in matrices, and is not available as a standard metric. This setting cannot be changed after the metric is created.</p>

Option	Description
	<p>Metrics available to a matrix cannot be displayed individually on project pages or in a standard quick grid. They can only be displayed in a project document based on the matrix Excel template or in a matrix grid within a quick grid.</p> <p> This option is not available for metrics created within Innovation Planning</p>
<p><b>Available to Phases</b></p>	<p>Select this check box to allow the metric to be defined as a phase metric for use with element types in Accolade Innovation Planning.</p> <p> This option is only available to select or modify from within Innovation Planning.</p>
<p><b>Available to Planning</b></p>	<p>Select this check box to allow the metric to be added to element types in Innovation Planning.</p> <p>If the <b>Available to Planning</b> check box is selected AND the metric is defined as a date type, select a shape from the drop-down list to represent a milestone date when included in a planning view.</p> <p><b>Note:</b> If the <b>Available to Planning</b> check box is selected, the <b>Available to Business Intelligence Tools</b> and <b>Available to Reporting</b> options will be automatically added to the metric settings when the metric is created.</p> <p> If the metric is used as a setting for a public planning view, you cannot clear this option.</p>
<p><b>Available to Portfolio Optimizer</b></p>	<p>Select one of the following to indicate the metric availability within Portfolio Optimizer:</p> <ul style="list-style-type: none"> <li>• <b>Not Available</b> - Not available in Portfolio Optimizer.</li> <li>• <b>Reporting Only</b> - Included in reports and in calculations, but is not visible or editable in Portfolio Optimizer. This option allows you to create metrics for reporting or calculations that are available to other metrics in Portfolio Optimizer without including the metric in the list of available columns in Portfolio Optimizer.</li> <li>• <b>Edit</b> - Visible and fully available in Portfolio Optimizer. Metrics that display on a project's Portfolio page should be selected for Portfolio Optimizer for users to see the same</li> </ul>

Option	Description
	metric data in Portfolio Optimizer as seen in the project.
<b>Available to Reporting</b>	<p>Select this check box to allow the metric in reports created using the Accolade Office Extensions add-in, Accolade Online Reporting, or reporting view, and within snapshots.</p> <p><b>Note:</b> If the <b>Available to Planning</b> check box is selected, the <b>Available to Business Intelligence Tools</b> and <b>Available to Reporting</b> options will be automatically added to the metric settings when the metric is created.</p> <p> If the metric is selected for inclusion in a portfolio snapshot, you cannot clear this option.</p>
<b>Available to Resource Editor</b>	Select this check box to make the metric displayable in the project details within Resource Editor, when associated with a project's model.
<b>Available to Workflow Line-up</b>	<p>Select this check box to make the metric displayable in the Workflow Line-up page.</p> <hr/> <p><b>Important!</b> The number of metrics selected as available to the workflow line-up has the potential to exponentially slow down the Workflow Line-up page load and navigation. Consider which metrics require visibility on this page.</p> <hr/>

5. *(Optional)* If the **Available to Planning** check box is selected AND the metric is defined as a date type, select a list metric with defined colors to set the color of a milestone date icon when included in a planning view.
6. Select the **Active** check box when the metric is ready to use in projects.  
To deactivate a metric that is not in use, clear the **Active** check box. Note that you can only [deactivate metrics](#) that are not included on a model.
7. Check the metric options to determine how and where a metric displays throughout the system.


Option	Description
<b>Allow Updates from All My Work page</b>	<p>Select this check box to include the metric as part of updating projects from the All My Work page.</p> <p>Users must have <b>Allow Updates from All My Work page</b> rights to update projects from the All My Work page.</p>

Option	Description
	 This option is not available for calculated metrics.
<b>Filter Metric</b>	<p>Select this check box to make this metric available as a filter in Search and various other locations throughout Accolade.</p> <p>A filter metric should contain values that clearly distinguish different project types or project groups. By default, you can create three filter metrics in Accolade, however the <b>Maximum Filter Metrics Allowed</b> parameter can be updated to allow for a maximum of 10. Although any type of metric other than long string can be designated as a filter metric, list metrics may be most usable for this purpose because of the ease of selecting the exact value needed. Using string metrics as filter metrics requires entering the exact string when filtering projects using filter metrics.</p> <p> <b>EXAMPLE</b> Example</p> <p>When a project contains descriptive metric data, such as project type, select the same filter values Search and similar pages to find the project. The pages list only those projects with matching filter values.</p>
<b>Inherited Metric</b>	<p>Select this check box to have this metric inherit its value from an instance of the same metric in a project higher in a portfolio structure.</p> <p>Finish creating the base metric and continue with creating a metric that inherits its value.</p>
<b>Track History</b>	<p>Select this check box to save information such as when a metric value changed, who made the change, when the change was made, and the original value before the change for historical reporting purposes.</p> <hr/> <p><b>Important!</b> Tracking metric history has the potential to create a large amount of history information. Carefully consider which metrics require history tracking, and track only those needed for historical purposes.</p> <hr/>
<b>Searchable Metric</b>	<p>Select this check box to make the contents of the metric searchable.</p> <p>This applies to:</p> <ul style="list-style-type: none"> <li>• <b>String</b></li> <li>• <b>List</b></li> <li>• <b>Long String</b></li> </ul>

Option	Description
	<ul style="list-style-type: none"> <li>• <b>Multi-Select List</b></li> </ul>


- In the **Restrict to These Roles** field, select one or more user roles to restrict the metric availability to users with one of those roles.
- In the **Initialize From** field, select the metric whose value you want to display in this metric before another value is entered. This list contains other metrics of the same data type.
- In the **Data Type** field, select the type of data this metric represents.

The **Data Type** selection determines what other options are available when configuring the metric.


Data Type	Description
<b>String</b>	Creates a text box that accepts up to 500 characters.
<b>Number</b>	Creates a text box that accepts only numerals, a decimal point, and a dash. Number metrics have a 15 character limit (including decimal points and dashes).
<b>Date</b>	Creates a calendar control that enables a date selection. Date metrics can also be defined as milestone dates.
<b>List</b>	Creates a drop-down list of items for a single selection. The complete list has a 2500 character limit, and each entry in the list has a 500 character limit for the list item display name. If the list source is a query or reference table, the list character limit does not apply.
<b>Long String</b>	Creates a text box where the options and character limit depends on if the Rich Text check box is enabled: <ul style="list-style-type: none"> <li>• <b>If Rich Text is enabled</b> - Allows users to format the text using buttons in the toolbar of the text box. There is a 2 GB limit to data that can be entered.</li> <li>• <b>If Rich Text is not enabled</b> - Allows users to enter plain text that can be formatted using markdown formatting. There is a 2000 character limit.</li> </ul> Long String metrics cannot be flagged as filter metrics.   If you require more than 2000 characters, enable the Rich Text check box or enable one or more <b>Extended Project Data</b> fields in the metadata in the process model.
<b>Multi-Select List</b>	Creates a drop-down list of items for multiple selections. Data limits are the same as for an ordinary list. The complete list has a 2500 character limit.

11. Complete the appropriate options for the metric type you are defining.

Number

Field	Description
<b>Number Format</b>	<p>Enter a <a href="#">custom number format</a> to specify how the value displays in a Word or PowerPoint document, or in quick grids when added to an Accolade field.</p> <p>If you do not enter a number format, numbers display without formatting.</p>
<b>Decimal Places</b>	<p>Enter an integer from <b>0</b> to <b>14</b> to specify the number of decimal places allowed in values for this metric.</p> <p>This is also the number of places to which the value is rounded in Accolade and in metric field codes. If you did not create a number format for Microsoft Office documents, this value also determines the value's decimal places when displayed in Microsoft Word and PowerPoint.</p> <p> Example</p> <p>To display the metric value as an integer, enter <b>0</b>. To display its values with two decimal places, such as 3.14, enter <b>2</b>.</p> <p>Metrics do not show trailing zeroes except in Portfolio Optimizer, project history, and Smart documents. For example, metrics set to 3.20 will show as 3.2.</p>

Date

Field	Description
<b>Relative Date</b>	<p>Select this check box to specify a time period before or after another date that serves as the metric reference date, such as a project start date or another date metric.</p> <p>The actual date is calculated and is displayed in reports in a column named <i>&lt;metric name&gt; Calculated</i>.</p> <p> Example</p> <p>If <b>Period</b> is set to <b>Monthly</b>, <b>Relative To</b> is set <b>Project End Date</b>, and the Project End Date is June 1, then a metric value of 1 equals July 1, a metric value of 2 equals August 1, and so on. You can also enter negative numbers to specify periods before the <b>Relative To</b> date.</p>

List

Field	Description
<b>List Source</b>	Select how to enter the list items, by entering a list manually, by query, or by reference table column selection.  Finish creating the base metric and then continue with <a href="#">creating the list for single and multi-select list metrics</a> or <a href="#">creating a cascading list metric</a> .

#### Long String

Field	Description
<b>Rich Text</b>	Select this check box to enable rich text editing. When <b>Rich Text</b> is selected, the following options are disabled: <ul style="list-style-type: none"> <li>• Business Intelligence Tools</li> <li>• Planning</li> <li>• Portfolio Optimizer</li> <li>• Reporting</li> <li>• Resource Editor</li> <li>• Workflow Line-up</li> <li>• Allow updates from All My Work page</li> <li>• Filter Metric</li> <li>• Inherited Metrics</li> <li>• Track History</li> <li>• Initialize From</li> <li>• Snapshots</li> </ul> <p>In addition to the above, all options on the <b>Calculated Formula and Events</b> tab are disabled as rich text metrics cannot be used in calculations. Additionally, long string metrics and matrix metrics configured as rich text cannot contain HTML script tags.</p> <p><b>Note:</b> Rich text metrics are available for use in the following areas: PowerPoint field codes, quick grids, advanced pods, and Web API.</p>

#### Multi-Select List

Field	Description
<b>List Source</b>	Select how to enter the list items, by entering a list manually, by query, or by reference table column selection.  Finish creating the base metric and then continue with <a href="#">creating the list for single and multi-select list metrics</a> or <a href="#">creating a cascading list metric</a> .



12. Associate the metric to multiple models.
13. On the **Security** tab, configure [access group restrictions](#) for the metric.  
Click **Process Model Usage** on the **Security** tab to see the list of process models that the metric is associated with. The list includes all process models the metric is included in, as well as links to the [process model's component tree](#) pages that you have Edit access to.
14. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.
15. *(Optional)* Continue with [creating](#) and [scheduling](#) metric calculations by selecting the **Calculated Formula and Events** tab to calculate the metric value from an expression of one or more metrics or Accolade fields and assign when the metric will calculate by based on a specific event or designated time.

**Notes:**


- Administrators can view existing metric definitions, but cannot add or modify metrics.
- Accolade is installed with limits to the number of metrics available to reporting via the Accolade Office Extensions add-in.
  - Number - 900
  - Date - 900
  - List - 450
  - Multi-Select List - 250
  - String - 200
  - Long String - 50
- Accolade Portfolio Optimizer, Innovation Planning and Roadmapping are optional Accolade components that you may not have access to. To implement these solutions, contact [Sopheon Customer Support](#).

## Creating Single and Multi-Select List Metrics


Create a metric that displays a list of drop-down items for selection, such as a metric used to define the difficulty of a project using a defined list with the values Easy, Average, and Difficult. Define list metrics for single or multiple selection of static list options that builds from selections in previous lists. To build a list with dynamic list options, see the [Creating Cascading List Metrics](#) topic in the online Help.

List metrics can also be defined to select a value based on a calculated expression. For example, you may have a cost metric that has list values of Under Cost, Actual Cost, and Over Cost. Instead of allowing users to select the value of that metric within a project, define the metric to use an expression that determines if a project is under, over, or at cost, and that sets the selection for the list metric. If the calculated value is not available in the list, it is added and set for that project only. The value is always set based on the calculation and is always read-only.

**To create a list metric:**

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create the basic metric, selecting one of the following options in the **Data Type** field:
  - **List** - Creates a list of options for a single selection.
  - **Multi-Select List** - Creates a list of options for multiple selections.
4. In the **List Source** field, select the method to use to define the list:

Method	Description
<b>Defined List</b>	<p>Select this option to define the list manually, creating a static list of items. Enter each list item's data and click <b>Add New</b> to create a new item. Enter the following for each item in the list:</p> <ul style="list-style-type: none"> <li>• <b>Name</b> - The item's display name, up to 500 characters long. A manually defined list can contain up to 2500 characters for the total of all the item display names. List item names cannot contain the pipe (   ) character.</li> <li>• <b>System Name</b> - (<i>Optional</i>) The item's unique ID, up to 64 characters long. The system name must be unique within metrics, not within all of Accolade. A system name may be required if this metric is integrated with a 3rd party system.</li> <li>• <b>Order</b> - The item's display order in the list.</li> <li>• <b>Color</b> - If you are creating a list metric in Innovation Planning, assign a color for use in legends within a Gantt view.</li> </ul>
<b>Reference Table</b>	<p>Select this option to use columns within a reference table to populate the list of items. Only reference tables set as <b>Available to Metrics</b> are available for selection. Select the table and the column within the table that contains the list item selections, noting that list item names cannot contain the pipe (   ) character. Only columns set as strings are available for selection.</p> <p>The items in a list generated from a reference table column display in the same order as listed in the column within the reference table.</p> <p>To create a cascading metric using a reference table, see the Creating Cascading List Metrics topic in the online Help.</p>

Method	Description
<b>Query</b>	<p>Select this option to use queries and query codes to populate the list of items. Items in the list change as the data that the query references change in Accolade, creating a dynamic list. Each item in a list derived from a query has a 500 character limit.</p> <p> Example</p> <p>To create a list that contain projects that are part of a class called Marketing, use the following query:</p> <pre data-bbox="505 579 1312 642">SELECT ProjectName FROM RVP_Projects WHERE (ClassName) = ('Marketing')</pre> <p>Select an existing query from the list or select <b>Add New Query</b> to create a new query. Use the <b>Edit</b> and <b>Preview</b> options to modify and test the query. See the Queries Overview topic in the online Help for information about building queries.</p>

- To create a metric whose value is determined by a calculation, select the **Calculated Formula and Events** tab and enter the expression in the **Calculated Formula** field. See the Calculated Metric Expressions Reference topic in the online Help for guidelines when creating calculated expressions, and the Scheduling Metric Calculations topic in the online Help to define when the metric calculates.
- Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

**Notes:**

- If you modify the list items in the definition of a List or Multi-Select metrics, open and closed projects retain the currently selected list value, even if that value has been removed. However, if a list item is removed from the metric definition, that item is no longer available for selection in new and open projects.

## Creating Cascading List Metrics

Using the List data type, Process Designers can create a cascading metric, or constrained metric, that displays different groups of list items depending on a data value. Creating the cascade requires a combination metrics: a "reference" metric, whose list options are all available, and a "restricted" metric, whose list options are limited to the values related to the reference metric's value.

For example, you could create the cascading metrics Business Unit, Brand, and Product Line, such that the Business Unit selection limits the Brand list options to the brands that are appropriate to for the currently selected Business Unit, and so on. In this way you can create a cascade, or series, of metrics that will present the appropriate set of choices at each level of the cascade.




Creating a cascading list metric is the same as creating a normal List metric; however, instead of creating a predefined list, either select columns from a reference table or write a query that constrains the returned values using a query field code in a WHERE clause.

- 💡 Using a reference table to constrain the list allows you to create the constrained list without a custom reporting view and without needing knowledge of SQL.

#### To create a cascading list metric using a reference table:

**Note:** This process assumes that you have already created the "reference" metric, and its values are also defined in a column within a reference table.

- From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
- Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
- Create the list metric using the **Reference Table** option in the **List Source** field.  
Only reference tables set as **Available to Metrics** are available for selection.
- [Create or select a reference table](#) and indicate the column within the table that contains this metric's list selections.  
Only reference table columns with the data type set as String are available for selection.

- In the **Filter** fields, select the reference table column that is used by the "reference" metric and will be used to restrict the list, and enter a query code that defines the value used for the restriction.

The value entered for the field can be one of the following:

- A query code that references another metric or a matrix metric within the project. Query codes that reference a metric or matrix metric use the **{\*QME:<metricsystemName>\*** format.
- A query code that references project metadata, such as **{\*QMD:ProjectAccessGroup\***. Query codes that reference metadata use the **{\*QMD:<metadataName>\***. See ["Query Field Codes Reference"](#) on page 756 for a list of valid metadata query codes.

Additional filters can be applied as necessary.



### Example

For example, a user wants to categorize all of their Accolade projects by region and country that they have business assets in. The user has created a reference table called Region List, which contains a column list of regions and a corresponding column list of countries, and has created the list metrics **Region** and **Country** to use in Accolade projects. Both metrics use the Region List reference table as a list source, and use the corresponding table columns to define the list options that can be selected when creating projects. Additionally, to minimize setup errors, the user wants the list of countries available for selection to be restricted by the value selected for the region.

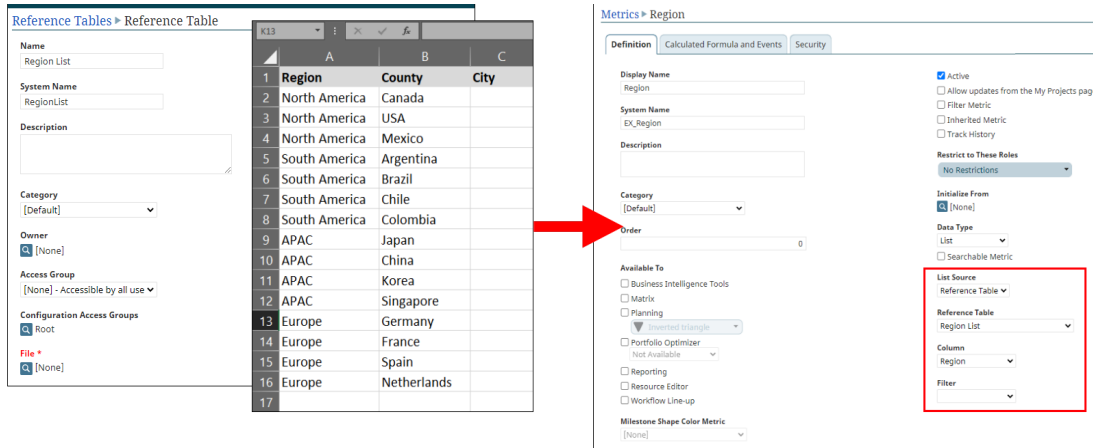
To set up the reference table, the user has included the following rows for each metric combination available for selection.

1	Region	Country	City
2	North America	Canada	
3	North America	USA	
4	North America	Mexico	
5	South America	Argentina	
6	South America	Brazil	
7	South America	Chile	
8	South America	Colombia	
9	APAC	Japan	
10	APAC	China	
11	APAC	Korea	
12	APAC	Singapore	
13	Europe	Germany	
14	Europe	France	
15	Europe	Spain	
16	Europe	Netherlands	
17			

The reference table includes rows for each metric combination that, when the value for "reference" metric is selected, limits the options available for the "restricted" metric.

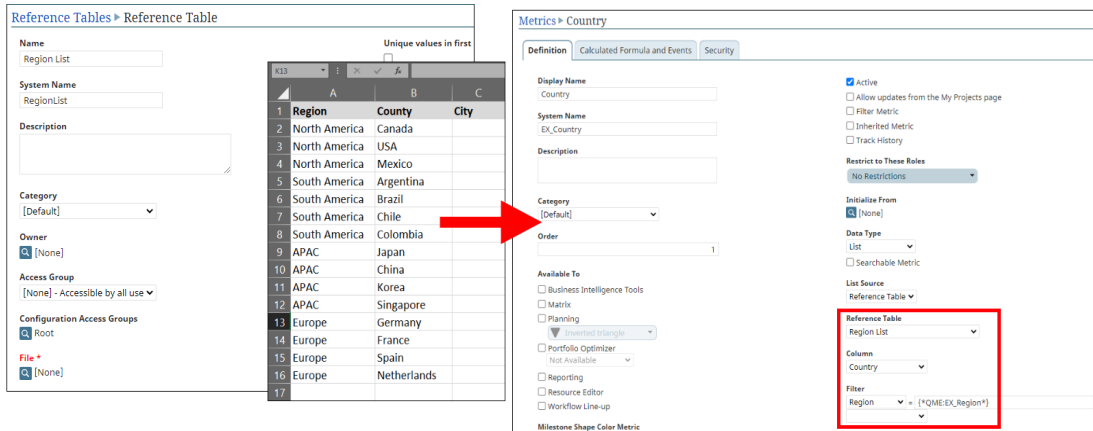
In this example, if the user selects **North America** as their Region value, the only options available for the Country value will be **Canada, USA, and Mexico**.

For this example, the user wants Region to be the "reference" metric. To set up the **Region** metric, the user selects Region List as the **List Source** and Region as the **Column** to use as the metric's list value options.

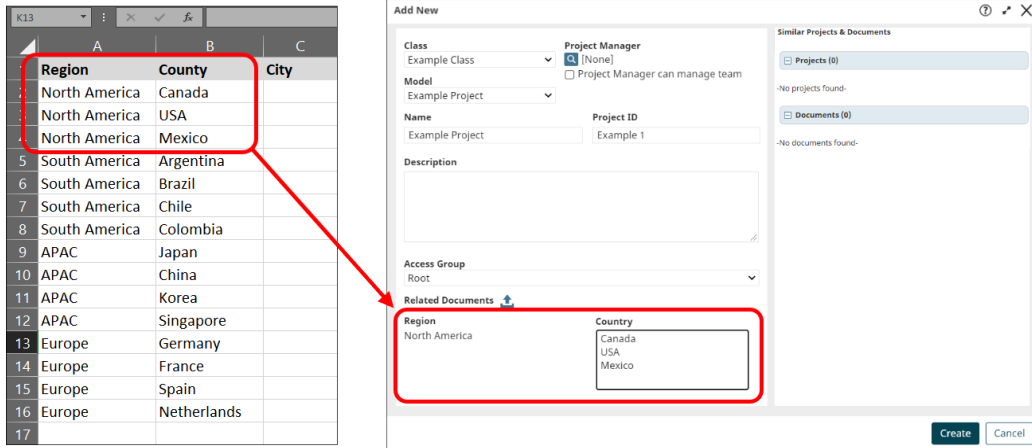


For this example, the user wants the Country metric to be the "restricted" metric. To set up the **Country** metric, the user selects Region List as the **List Source** and Country as the **Column** to use as the metric's list value options, but must add an additional filter in order to restrict the available list selections based on the Region value. In the **Filter** fields, the user selects **Region** as the column to be used as the filter to restrict the list, and enter **{\*QME:EX\_Region\*}** as the value of this filter.

As entered, the filter and query expression combination states that **Country** values that have a matching **Region** value should be included in the list of options available for selection.




To further illustrate this: in the example below, the user has selected **North America** as the **Region** value. Based on the applied filtering, the available country selections are restricted to **Country** values that have corresponding North America **Region** values (which are Canada, USA, and Mexico, based on the table setup).



Note that in the example above, the user could have created and applied additional list metrics, for example creating a **City** metric in the reference table whose list options can be restricted both by applying filters both to the **Region** value `{*QME:EX_Region*}` and to the **Country** value `{*QME:EX_Country*}`.

6. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

#### To create a cascading list metric using a query:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. **Create a list metric** using the **Query** option in the **List Source** field.
4. **Create or select a query** that uses a query field code included in a WHERE clause to restrict the list.

At the highest level, a SQL query for a cascading list looks like:

```
SELECT Child Column
FROM View
WHERE Parent Column = {*QME:<metric system name>}
```

#### EXAMPLE Example

Consider the following SQL query that uses the GlobalRegions reference table, and refines the city selections based on the selections made for the region, country, and state. The city list only displays cities that are within the region/country/state area:

```
SELECT Distinct City
FROM CRV_Ref_GlobalRegions
Where Region = '{*QME:qblRegion*}' AND Country
= '{*QME:qblCountry*}' AND State
= '{*QME:qblState*}'
```

The top level of the cascade can be a list metric that is either populated by a query or defined manually.

5. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

#### Notes:

- Administrators can view existing metric definitions, but cannot add or modify metrics.
- It is not necessary for the parent metric in a cascade to appear on the same page as the child metric. The constraint is based on the selected value of the parent metric as found in the database.
- You can create a constrained metric that is not part of a cascade. The query is constrained by metadata rather than by another metric.
- If a cascading metric is selected as a filter metric, it does not cascade on the page where it is used as a filter. All of its list items display as if it were an ordinary list.
- If a query contains a reference to a RVP\_ or CRVP\_ reporting view, the result displays **[Unavailable]** when used on an external Idea Submission form. External users do not have the security rights to see the data contained within those views.
- In Innovation Planning and Roadmapping, a cascading list metric included in a matrix does not enforce the cascade. For example, if there is a state selection that restricts the cities available for selection, the city list shows all cities and does not filter to the selected state.
- Idea Submission (as a part of Accolade Ideation), Innovation Planning and Roadmapping are optional Accolade components that you may not have access to. To implement these solutions, contact [Sopheon Customer Support](#).

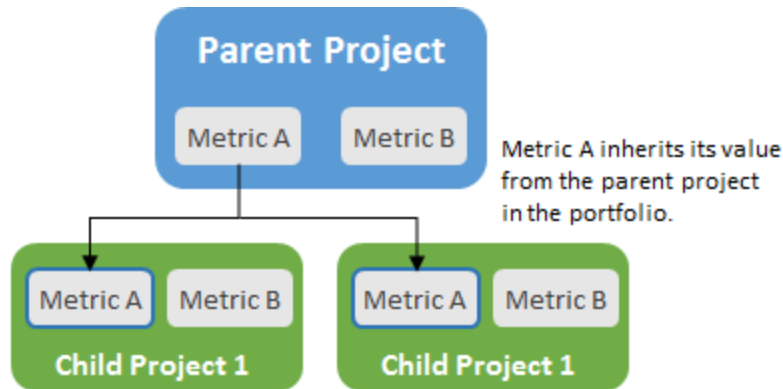
## Creating Metrics that Inherit Their Value

Inherited metrics display metric values that are defined in linked projects, typically in a collection of projects called a portfolio. Within a portfolio, when information is entered in the metric in the parent project, it displays in any instance of the same metric in the child projects within the portfolio. If those projects also contain child projects, the same data is displayed in the metric in those projects as well, and so on down through the portfolio structure.


If someone enters a different value in an inherited metric on a child project, that metric on that child project and any project below it in the portfolio structure no longer inherit changes made to the metric above it in the structure. Change the value in the metric in the child project to be the same value as the metric in the parent project to restore the inheritance.



Administrators and Process Designers create the inherited metrics, and Process Designers associate them with models. Process Managers and Project Managers create links between projects using the **Contains** project link and **Member Of Project** links to create a portfolio structure where the metrics inherit their values.



#### To create a metric that inherits its value:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create any metric type and select the **Inherited Metric** check box to indicate the metric inherits its value.
4. Associate the metric with the models of both the top container project in the portfolio structure and the projects in the portfolio that display the value.  
It is not necessary for every project in a portfolio structure to have the same model.
5. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

#### Notes:

- Administrators can view existing metric definitions, but cannot add or modify metrics.
- You can also use inherited metrics outside of portfolios.
- Accolade Portfolio Management and Portfolio Optimization are optional Accolade components that you may not have access to. To implement these solutions, contact Sopheon Customer Support.

## Initializing Metrics with Default Display Values

You can set up a metric so it displays a default value before a user enters data into the metric, rather than initially displaying blank. After a user modifies the data in the metric, the link with the source metric is broken, and the modified metric contains the data entered.

---


**Important!** Initializing a metric with a default value only displays the value in the target metric within Accolade. The value does not transfer to Smart Excel documents or reports.

---

Metrics that pull a default display value from another metric cannot be on the same page within Accolade as the metric from which they get their value. Therefore, a metric that is set to contain an initial value from another metric should conform to the following rules:

- The metric should not be in the same category as its initializing metric.
- The metric should not be editable or appear together with its editable initializing metric on the project creation page, Home, or Details pages within a project.
- The metric should not be in the same Smart Excel document or online form with its initializing metric.

### To initialize a metric with a default display value:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create any metric type.
4. In the **Initialize From** field, select the metric value to use in this metric until another value is entered or selected.

If you are creating or modifying a metric that uses the List or Multi-Select List data type, select an initializing metric that has an identical set of list items. If either metric is query based, ensure that the initializing metric contains all the list items that could occur if both metrics are based on the same query.

5. Click **Apply** to save your changes.

#### Notes:

- If the metric selected in the **Initialize From** field is deleted or made inactive, new instances of the metrics that use it for their default value are blank.
- Metric initialization is affected by the **Default Online Form Fields to Dirty** parameter

available in the Administration Console.

If the parameter is enabled, metrics that are set for initialization behave in an online form as if the initializing value is entered manually when the form is first opened. That is, the initializing link is broken and no further automatic updates of the value occur. If the parameter is disabled, the initialized metric continues to change when the source metric is changed until the initialized metric is changed manually.

## Creating Metrics Using Expressions (Calculated Metrics)


The value of a calculated metric is defined using an expression within the metric definition.

Typically, this metric type is based on the values of one or more metrics, which can themselves be calculated metrics. Valid expressions are comprised of other metrics, metadata (field codes), valid operators, and functions. Calculated metrics display as read-only values when displayed in a project, and can be recalculated on scheduled events. See ["Scheduling Metric Calculations" on page 163](#).

Security profiles cannot contain metrics with calculated values.

The procedure below describes how to define the expression within the metric definition. For information about writing the expressions themselves, the components available, and considerations for Portfolio Optimizer, see the calculated metrics information in the Accolade online Help.

### To create a metric using an expression:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create the basic metric and select the **Calculated Formula and Events** tab.
4. In the **Calculated Formula** field, enter the expression following the guidelines in the Calculated Metric Expressions Reference topic in the Accolade online Help.
5. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.

### Notes:

- If a metric's calculated value extends beyond the allowable characters for the metric type, the data stored and displayed for that metric is truncated as follows:
  - String - 500 characters
  - Long String - 2000 characters


- Number - 15 characters
- Multi-Select List - 2500 characters
- List - 2500 characters

## Calculated Metric Expressions Reference

Calculated metrics can contain references to other metrics, metadata in the form of field codes, operators, and functions. The tables in the sections below contain the operators and the functions available when writing expressions. See ["Accolade Field Codes and Substitution Tokens" on page 765](#) for information about the metadata available within Accolade. Note that certain project data field codes are not available for use in calculations. Use the equivalent function listed below instead.

### Operators

Operators are process or mathematical parts of expressions, such as addition and multiplication, and relationships such as greater than or less than. Use the operators below within your calculated metric expressions.

Operator	Example
<b>Additive and Subtractive Operators</b>	
+ (plus, plus sign)	{*METRIC:NPV*}+{*METRIC:fut*}
- (minus, dash)	{*METRIC:NPV*}-{*METRIC:Cost*}
<b>Multiplicative Operators</b>	
* (multiplied by, asterisk)	10*{*METRIC:NPV*}
/ (divided by, slash)	{*METRIC:NPV*}/{*METRIC:fut*}
% (mod, percent sign)	{*METRIC:NPV*}%10
<b>Primary Operators</b>	
value (integers, text strings, dates, functions)	('this is a text string')   While single quotes work for dates, we recommend wrapping dates in pound or hash signs instead to ensure consistency of data types. For example, (#2021-10-19#).
( ) (parentheses)	1000-(6*{*METRIC:NPV*})
<b>Relational Operators</b>	
= (equals)	{*METRIC:NPV*}=250

Operator	Example
<> (does not equal)	{*METRIC:NPV*}<>{*METRIC:fut*}
> (greater than, angle bracket)	{*METRIC:NPV*}>250
>= (greater than or equal to)	{*METRIC:NPV*}>=250
< (less than, angle bracket)	{*METRIC:Cost*}<500
<= (less than or equal to)	{*METRIC:Cost*}<=100
Logical Operators	
or,    (double pipe)	{*METRIC:Cost*}<{*METRIC:NPV*}   {*METRIC:Cost*}<500
and, &&	{*METRIC:Cost*}<{*METRIC:NPV*}&& {*METRIC:Cost*}<1000

## Functions

The functions included in the calculated metric determine in part what is returned in the metric. Use the functions described below within your calculated expressions to return data within a calculated metric.

**Note:** All functions are supported in calculated metrics in Accolade Portfolio Optimizer unless otherwise noted.

Function	Description	Example	Result
Abs	Returns the absolute value of a specified number.	Abs(-1)	1
Acos	Returns the angle whose cosine is the specified number.	Acos(1)	0
Asin	Returns the angle whose sine is the specified number.	Asin(0)	0
Atan	Returns the angle whose tangent is the specified number.	Atan(45)	1
Avg	Returns the average of a set of values.	Avg(1, 5, 6)	4
Ceiling	Returns the smallest integer greater than or	Ceiling(1.5)	2

Function	Description	Example	Result
	equal to the specified number.		
CellValue	Returns a value in the matrix column specified by a defined metric.	CellValue('Year')	The value in the matrix column with the matrix metric 'Year'.
<p>CellValue Format: CellValue('MatrixMetricsystemName')</p> <p>CellValue Parameters:</p> <ul style="list-style-type: none"> <li>MatrixMetricSystemName - the system name of the matrix metric to reference. This must be the system name, and cannot be a substitution token.</li> </ul> <p>This function is valid for use in the filter expression argument of the <a href="#">GetMatrixColumn</a> function, and will return values from the same row as the metric that uses the function.</p> <p>CellValue can only be used in matrix metrics, and can only reference matrix metrics.</p>			
Concatenate	<p>Joins text strings into a single string in the specified order.</p> <p>To include a delimiter between values in the concatenated string, use the Join function instead. You can concatenate as many strings together as you need.</p> <p>If a metric's calculated value extends beyond the allowable characters for the metric type, the data stored and displayed for that metric is truncated as follows:</p> <ul style="list-style-type: none"> <li>String - 500 characters</li> <li>Long String - 2000 characters</li> <li>Number - 15 characters</li> </ul>	<p>Concatenate('text1', {'*METRIC:MyString*'}, 'text2', 'textN')</p> <p>If the value of MyString = abc, the concatenated value would be text1abctext2textN.</p>	A continuous text string

Function	Description	Example	Result
	<ul style="list-style-type: none"> <li>Multi-Select List - 2500 characters</li> <li>List - 2500 characters</li> </ul>		
Contains	Returns whether one string is contained in another.	Contains('Blue', 'My Blue Heaven', 2, 7)	True
<p>Contains Format: Contains('findString', 'withinString', [startIndex, length])</p> <p>Contains Parameters:</p> <ul style="list-style-type: none"> <li>findString - The string to find.</li> <li>withinString - The string in which to search for the find.</li> <li>String startIndex - (<i>Optional</i>) Number of characters from the beginning of within. Minimum value is 1.</li> <li>length - (<i>Optional</i>) Number of characters from the startIndex to search.</li> </ul>			
Con-vertToCorporateCurrency	Returns the value of the specified metrics in the defined corporate currency.	Con-vertToCorporateCurrency ({*METRIC:ProjectACurrency*})	The ProjectACurrency metric value converted to the corporate currency
<p>ConvertToCorporateCurrency Format: ConvertToCorporateCurrency ({*METRIC:systemName*})</p> <p>ConvertToCorporateCurrency Parameters:</p> <ul style="list-style-type: none"> <li>Field code or integer value - The value being converted to the corporate currency. This typically includes the metric system name or metadata field code assigned to the values to convert and return as the corporate currency. It can also be an integer to convert.</li> <li>Valid currency code - (<i>Optional</i>) A valid currency code other than the corporate currency to convert the specified values to. This can also be a metadata field code for a project currency.</li> </ul> <p>Additional ConvertToCorporateCurrency Examples:</p> <ul style="list-style-type: none"> <li>ConvertToCorporateCurrency(CellValue('MatrixMetricsystemName'))</li> <li>ConvertToCorporateCurrency(1000)</li> <li>ConvertToCorporateCurrency({*METRIC:systemName*}, 'EUR')</li> <li>ConvertToCorporateCurrency(1000, {*MD:ProjectCurrencyCode*})</li> </ul> <p>Note that if using this formula, changes to the project currency code or the currency reference table containing exchange rates and conversion factors will result in a recalculation of all calculations using this formula.</p>			

Function	Description	Example	Result
Cos	Returns the cosine of the specified angle.	Cos(0)	1
Count	Returns the number of elements in an expression.  'true' includes null values of the specified expression. 'false' excludes null values.	Count(GetMatrixColumn('mxFinancials', 'Cost', Region = 'USA'), true)	A list of elements returned by the GetMatrixColumn expression including null values.
<p>Count Format: Count(&lt;function returning an array&gt;, &lt;true/false&gt;)</p> <p>Count Parameters:</p> <ul style="list-style-type: none"> <li>Function returning an array - A function that returns a list of values. Use LinkedProjectValue and GetMatrixColumn as a best practice.</li> <li>true or false - Determines whether to include null values or not. The true or false value must be lower case and not include quotes around it.</li> </ul>			
CurrentMatrixValue	Returns the current value of a metric. This function is the same as CurrentValue, but used in a matrix.  The CurrentMatrixValue function does not support nesting calculations in Accolade Portfolio Optimizer.  This is a self-referencing function where the system name must be the system name of the metric calling the function.	CurrentMatrixValue ('Today')	The current value of the Today metric in a matrix cell
<p>CurrentMatrixValue Format: CurrentMatrixValue('systemName')</p> <p>CurrentMatrixValue Parameters:</p> <ul style="list-style-type: none"> <li>systemName - The system name assigned to the metric calling the function to return the current value.</li> </ul>			



Function	Description	Example	Result
<p>Combine with other functions. For example:</p> <p><code>if({*METRIC:A*}='Current', Concatenate('Today', Now()), CurrentMatrixValue('Today'))</code></p> <p>If metric A is set to Current, the value in the matrix cell is set to Today, concatenated with today's date. For example, Today is 5/20/17. If metric A is set to anything other than Current, the value remains the same.</p> <p>Note that if using CurrentMatrixValue as a function in a matrix and updating the matrix in MS Excel, you must uniquely identify the row by <a href="#">flagging matrix metrics as unique</a>. If matrix columns are not unique or the MS Excel workbook contains duplicate columns, the CurrentMatrixValue function value cannot be updated. The Smart Excel template does not update, upload, or publish back to Accolade.</p>			
<p>CurrentValue</p>	<p>Returns the current value of a metric.</p> <p>The CurrentValue function does not support nesting calculations in Accolade Portfolio Optimizer.</p> <p>This is a self-referencing function where the system name must be the system name of the metric calling the function.</p>	<p><code>CurrentValue('Confidence')</code></p>	<p>The current value of the Confidence metric</p>
<p>CurrentValue Format: <code>CurrentValue('systemName')</code></p> <p>CurrentValue Parameters:</p> <ul style="list-style-type: none"> <li>systemName - The system name assigned to the metric calling the function to return the current value.</li> </ul> <p>Combine with other functions. For example:</p> <p><code>if({*METRIC:NPV*}&lt;500, 'At Risk', CurrentValue('Confidence'))</code></p> <p>If NPV is less than 500, the metric that contains this calculation is set to At Risk. If NPV is greater than 500, it is set to the current value in the Confidence metric.</p>			
<p>DateAdd</p>	<p>Adds a number of time periods to a date.</p>	<p><code>DateAdd('D', 5, Now())</code></p>	<p>5 days added to current date</p>
<p>DateAdd Format: <code>DateAdd('type', number, #date#)</code></p> <p>DateAdd Parameters:</p> <ul style="list-style-type: none"> <li>type - D: Day, H: Hour, MN: Minute, S:Second, M: Month, Y: Year.</li> </ul>			

Function	Description	Example	Result
	<ul style="list-style-type: none"> <li>number - An integer.</li> <li>date - The date to adjust, can be a date metric or the Now function.</li> </ul>		
DateDiff	Returns the selected difference between two dates.	DateDiff('D',ProjectNextGateDate(), ProjectStartDate())	Days between project start and next gate
<p>DateDiff Format: DateDiff('type', #endDate#, #startDate#)</p> <p>DateDiff Parameters:</p> <ul style="list-style-type: none"> <li>type - D: Day, H: Hour, MN: Minute, S: Second, M: Month, Y: Year.</li> <li>endDate - The ending date.</li> <li>startDate - The starting date.</li> </ul>			
DateFormat	Returns a date in the specified date format as a string.	DateFormat(ProjectCreationDate(), 'M/d/yyyy')	Date the project was created in M/d/yyyy format.
<p>DateFormat Format: DateFormat(#date#, 'dateFormat')</p> <p>DateFormat Parameters:</p> <ul style="list-style-type: none"> <li>date - A specified date or function indicating a date.</li> <li>dateFormat - Date format in which to return the value. The inputs allowed for this parameter are strings using string-type metrics.</li> </ul> <p>Supported date formats are those set in the <a href="#">Accolade user profile</a>, included the following: M/d/yyyy, MMM dd, yyyy, d/M/yyyy, dd/MM/yyyy, d.M.yyyy, d-M.yyyy, yyyy-MM-dd, yyyy/M/d, yyyy.M.d.</p> <p>Combine with other functions. For example:</p> <p>DateFormat(Now(), 'M/d/yyyy') returns today's date such as 10/15/2018.</p>			
DatePart	Returns the selected part of a date.	DatePart('M', #5/15/2013#)	5
<p>DatePart Format: DatePart('type', #date#)</p> <p>DatePart Parameters:</p> <ul style="list-style-type: none"> <li>type: D - Day, H: Hour, MN: Minute, S: Second, M: Month, Y: Year.</li> <li>date - The date containing the part you want.</li> </ul>			
Exp	Returns e raised to the specified power	Exp(0)	1
Find	Returns how far from the start of a string a contained string was found. Case sensitive.	Find('Blue', 'My Blue Heaven', 2, 20)	4

Function	Description	Example	Result
<p>Find Format: Find('findString', 'withinString', [startIndex, length])</p> <p>Find Parameters:</p> <ul style="list-style-type: none"> <li>• findString - The string to find.</li> <li>• withinString - The string in which to search for the findString.</li> <li>• startIndex - (<i>Optional</i>) Number of characters from the beginning of withinString to start searching. Minimum value is 1.</li> <li>• length - (<i>Optional</i>) Number of characters from the startIndex to search.</li> </ul>			
First	Returns the first value that is returned in a list of values.	First(1, 5, 6)	1
Floor	Returns the largest integer less than or equal to the specified number.	Floor(1.5)	1
GateDecision	Returns the decision for the specified gate.	GateDecision(2)	A string of the decision for the second gate in the project
<p>GateDecision Format: GateDecision('1-20') or GateDecision({*METRIC:systemName*})</p> <p>Gate Decision Parameters:</p> <ul style="list-style-type: none"> <li>• 1-20 - An integer value correlating to the gate on the project. 1 indicates the first gate on the project.</li> <li>• Metric field code system name - The referenced field code must return an integer value 1-20.</li> </ul>			
GetMatrixColumn	Returns an array from a matrix.  This function must be used with the Join, Concatenate, Count, Avg, First, Min, Max, or Sum function to perform a calculation on the values returned from the matrix column.	Sum(GetMatrixColumn('mxSales', 'Profit', (Market = 'US'    Market = 'Europe') && Profit > 10000))	In the 'mxSales' matrix, the function returns the sum of profit for the US and Europe markets greater than 10,000 USD.
<p>GetMatrixColumn Format: GetMatrixColumn('matrixSystemName', 'targetColumnSystemName', filterExpression)</p> <p>GetMatrixColumn Parameters:</p>			

Function	Description	Example	Result
<ul style="list-style-type: none"> <li>matrixSystemName - The system name of the matrix. This must be the system name, and cannot be a substitution token or nested function.</li> <li>targetColumnSystemName- The system name of the column to return values.</li> <li>filterExpression - (<i>Optional</i>) Inputs used to filter columns in the matrix. Elements that meet the search criteria are returned as an array. Valid inputs include column system names, metric and metadata tokens, IsNull, and hard-coded values. The expression must equate to true or false. Use operators to join filter expressions for more complex filtering.</li> </ul> <p>Additional GetMatrixColumn Examples:</p> <ul style="list-style-type: none"> <li>Count(GetMatrixColumn('mxSales', 'Profit', SalesYear &gt;= 2010 &amp;&amp; Profit &lt; 0), true) - Returns the number of sales years since 2010 that had a negative profit.</li> <li>Join(GetMatrixColumn('mxSales', 'Market', Profit &gt; 0), ', ') - Returns all markets in the 'mxSales' matrix that made a profit.</li> <li>Sum(GetMatrixColumn('mxSales', 'Profit', IsNull(Costs, 0) &gt; 1000)) - Returns the sum of profit where the costs exceeded 1000.</li> <li>Sum(GetMatrixColumn(('mxSales', 'Cost', Year = CellValue(#Year#))) - Returns the total costs by year.</li> </ul>			
IEEERemainder	Returns the remainder resulting from the division of a specified number by another specified number.	IEEERemainder(13, 5)	3
If	Returns a specified string or value based on a condition.	If({*METRIC:NPV*}>500, 'Go ahead', 'Stop')	Go ahead
In	Returns whether an element is in a set of values.	In(1+1, 1, 2, 3)	True
IRR	Returns the Internal Rate of Return value for a series of cash flows.	IRR(GetMatrixColumn('mxFinancials', 'Cost', Region = 'USA'))	Returns the internal rate of return value for the cash flows returned by the GetMatrixColumn function.
<p>IRR Format: IRR(value array, [guess])</p> <p>IRR Parameters:</p> <ul style="list-style-type: none"> <li>Value Array - An array passed in as an object specifying cash flow values. The array must contain at least one positive value (a receipt) and one negative value (a payment).</li> </ul>			

Function	Description	Example	Result
<p>GetMatrixColumn is currently the only function that can be passed in as an object and return an array. If the data is not valid, the calculation will be skipped. Invalid data is defined as the following:</p> <ul style="list-style-type: none"> <li>No values</li> <li>Array of strings or date values</li> <li>Only positive values</li> <li>Only negative values</li> <li>Only zeros</li> </ul> <ul style="list-style-type: none"> <li>Guess - (<i>Optional</i>) A value you estimate will be returned by IRR. If omitted, guess is 0.1 (10 percent). If the data is not valid, the calculation will be skipped. Invalid data is defined as the following: <ul style="list-style-type: none"> <li>Guess value of -1 or lower</li> </ul> </li> </ul>			
IsNull	<p>Checks if the first parameter is an empty value.</p> <p>If the parameter value is null, returns the second parameter value; otherwise, returns the first parameter value.</p>	IsNull(ProjectEndDate(), { *METRIC:FinanceStartDate* })	Finance start date if the project end date is not defined
<p>IsNull Format: isNull({parameter1},{parameter2})</p> <p>IsNull Parameters:</p> <ul style="list-style-type: none"> <li>parameter1 - The parameter to check for no value.</li> <li>parameter2 - If no value in parameter1, sets this parameter.</li> </ul>			
Join	<p>Joins text strings together into a single string in the specified order, separated by a delimiter.</p> <p>For example, create a metric using this function to create a list of the child projects for a particular project, sending in ' ' as the delimiter. Then create a multi-select list that uses the resulting</p>	Join(LinkedProjectValues ('children', 'to', 'Code'), ' ')	A list of values separated by  .

Function	Description	Example	Result
	<p>project names to select from.</p> <p>To join text strings with other provided values, use the Concatenate function.</p>		
<p>Join Format: Join(&lt;function returning an array&gt;, '&lt;delimiter&gt;')</p> <p>Join Parameters:</p> <ul style="list-style-type: none"> <li>Function returning an array - A function that returns a list of values from the same object. The LinkedProjectValues function and GetMatrixColumn are the only functions that return an array.</li> <li>Delimiter - Any character to separate returned values, such as a pipe (   ).</li> </ul>			
Length	Returns the length of a string.	Length ({*METRIC:myString*})	An integer
LinkedProjectValues	<p>Returns the values of the specified metrics for linked projects.</p> <p>This function must be used with the Join, Concatenate, Count, Avg, First, Min, Max, or Sum function to perform a calculation on the values returned from the linked projects. Use this function to calculate roll up values in projects that contain one or more related projects.</p> <p>Metrics that contain this calculation cannot be used when creating automatic project linking rules. When applying a metric that uses this formula, consider where</p>	<p>Sum(LinkedProjectValues ('ABToCSG','To','NPV',-5))</p> <p>(see below for additional examples)</p>	<p>Totals the values in the NPV metric in projects that are linked to the project using the ABToCSG link type. This example totals values in projects up to five levels deep.</p>

Function	Description	Example	Result
	<p>calculations take place. For example, if a parent project and its child projects use the same model that contains a metric with this calculation, the calculated metric recalculates for all projects in the chain.</p> <p>The LinkedProjectValues function is not supported in Accolade Portfolio Optimizer. Metrics that contain this function cannot be set as matrix metrics.</p>		
<p>LinkedProjectValues Format: LinkedProjectValues ('linkTypeSystemName','direction','returnMetricSystemName',traverseLevel)</p> <p>LinkedProjectValues Parameters:</p> <ul style="list-style-type: none"> <li>linkTypeSystemName - The system name of the link type used to create the project links. To specify the hierarchy link type, use <b>HierarchyLinkDefault</b> as the system name. This must be the system name, and cannot be a substitution token.</li> <li>direction - The direction to or from the project that contains the calculation to gather and return values. <b>To</b> traverses down the hierarchy; <b>From</b> traverses up the hierarchy. If your values do not calculate correctly, ensure that the project links were created in the appropriate direction.</li> <li>returnMetricSystemName - The system name of the metric value to return. This must be the metric system name, and cannot be a substitution token.</li> <li>traverseLevel - (<i>Optional</i>) The number of levels from the project that contains the calculation to gather and return values. If no value is included, values are returned for all levels in the hierarchy.</li> </ul> <p>Additional LinkedProjectValues Examples:</p> <ul style="list-style-type: none"> <li>Sum(LinkedProjectValues('ABToCSG','To','NPV')) - Returns the total of all values entered in the NPV metric in projects that are linked to the parent project using the ABToCSG link type.</li> <li>Avg(LinkedProjectValues('ABToCSG','To','NPV',3)) - Returns the average of the NPV metric in projects that are linked up to three levels deep in the hierarchy to the parent project using the ABToCSG link type.</li> </ul>			

Function	Description	Example	Result
Log	Returns the logarithm of a specified number for a specified base.	Log(1, 10)	0
Log10	Returns the logarithm of a specified number to base 10.	Log10(1)	0
Lower	Returns a text string with all lower case.	Lower('Hello')	hello
LTrim	Removes leading spaces from a string.	LTrim ({*METRIC:myString*})	A string without a leading space
Max	Returns the largest of the specified values.	Max(1, 5, 6)	6
Min	Returns the smallest of the specified values.	Min(1, 5, 6)	1
ModelName	Returns the name of the model.	ModelName()	
MostRecentGateDecision	Returns the gate decision from the most recent phase change.	MostRecentGateDecision ()	
Now	Returns the current date and timestamp.	Now()	
NPV	Returns the net present value of a series of cash flows based on a specified discount rate.	NPV(.12, 10, 12, 8, 16)	34.4

NPV Format: NPV(rate, <series of cash flow values>)

NPV Parameters:

- Rate - The discount rate.
- Series of cash flow values - Series of values separated by a comma delimiter. Can also be an array passed in as an object or a series of metric values.

Additional NPV Examples:

- NPV(.12, GetMatrixColumn('mxFinancials', 'Cost', Region = 'USA')) - Returns the net present value of the cash flows returned by GetMatrixColumn based on a 12% discount rate.
- NPV(.12, {\*METRIC:Year1Financials\*}, {\*METRIC:Year2Financials\*}) - Returns net



Function	Description	Example	Result
present value of Year1Financials and Year2Financials based on a 12% discount rate.			
PaybackPeriod	Returns the payback period.	PaybackPeriod('cash_flow', '~Net_Cash_Flow', '~Cash_Flow_Relative_Date')	A decimal number displaying the payback period in years.  If the payback period cannot be calculated, the function returns 0.
Payback Period Parameters: <ul style="list-style-type: none"> <li>• Financial matrix - Captures costs and revenue.</li> <li>• Cash Flow - The difference between total revenue and total costs.</li> <li>• Relative Date - The relative period of time in which costs and revenue are recorded.</li> </ul>			
Pow	Returns the value of a number raised to the specified power.	Pow(3, 2)	9
ProjectAccessGroup	Returns the name of the project's access group.	ProjectAccessGroup()	
ProjectClass	Returns the name of the project's class.	ProjectClass()	
ProjectClosed	Returns the project's closure status.	ProjectClosed()	
ProjectCreatedByID	Returns the ID of the user that created the project.	ProjectCreatedByID()	
ProjectCreatedByName	Returns the name of the user that created the project.	ProjectCreatedByName()	
ProjectCreationDate	Returns the date when the referenced project was created.	ProjectCreationDate()	
ProjectCurrentPhase	Returns the system ID of the current/stage/gate pair in	ProjectCurrentPhase()	

Function	Description	Example	Result
	<p>the referenced project.</p> <p>The project current phase is set to <b>0</b> if the project ends in a gate, and the gate's decision is set to <b>Go</b>.</p>		
ProjectCurrentStageName	Returns the name of the current project stage.	ProjectCurrentStageName()	
ProjectDescription	Returns the description of the project from the model.	ProjectDescription()	
ProjectEndDate	Returns the date the project ended.	ProjectEndDate()	
ProjectGateDate	Returns the date of the gate meeting of a specific gate.	ProjectGateDate(1)	The date for the first gate meeting in the project
<p>ProjectGateDate Format: ProjectGateDate('1-20') or ProjectGateDate({*METRIC:systemName*})</p> <p>ProjectGateDate Parameters:</p> <ul style="list-style-type: none"> <li>1-20 - An integer value correlating to the gate on the project. 1 indicates the first gate on the project.</li> <li>Metric field code system name - The referenced field code must return an integer value 1-20. For example, ProjectGateDate('{*METRIC:NumberMetric*}') would return an integer value between 1-20.</li> </ul>			
ProjectHealthScore	Returns the project's health score from the connected Acclaim Projects project.	ProjectHealthScore()	The project health score from Acclaim Projects.
ProjectID	Returns the user-created ID of the referenced project.	ProjectID()	
ProjectMostRecentStatus	Returns the text of the most recent status report on the referenced project.	ProjectMostRecentStatus()	

Function	Description	Example	Result
ProjectMostRecentStatusAuthor	Returns name of the person who created the project's most recent status report.	ProjectMostRecentStatusAuthor()	
ProjectMostRecentStatusDate	Returns the date the project's most recent status report was created.	ProjectMostRecentStatusDate()	
ProjectName	Returns the name of the project.	ProjectName()	
ProjectNextGateDate	Returns the date of the next gate meeting in the project.	ProjectNextGateDate()	
ProjectNextGateName	Returns the name of the next gate in the project.	ProjectNextGateName()	
ProjectNextGateOwnerName	Returns the name of the gate owner of the project's next gate.	ProjectNextGateOwnerName()	
ProjectPreviousGateDate	Returns the date of the gate meeting before the current stage.	ProjectPreviousGateDate()	
ProjectStartDate	Returns the date when the project started.	ProjectStartDate()	
ProjectTeamLeaderEmail	Returns the email address of this project's Project Manager.	ProjectTeamLeaderEmail()	
ProjectTeamLeaderName	Returns the name of this project's Project Manager.	ProjectTeamLeaderName()	
ReferenceTable	Returns the value from the specified cell of a reference table.  If a calculated metric uses the ReferenceTable	ReferenceTable('Currency', 'CurrencyCode', 'USD', 'Value2015')	The value from the Value2015 column for the given filter

Function	Description	Example	Result
	function, the reference table must be marked as <b>Available to Portfolio Optimizer</b> for the metric calculation to work in Portfolio Optimizer.		
<p>ReferenceTable Format: ReferenceTable('RefTableSystemName', 'sourceColumn1', 'sourceColumnValue1', 'sourceColumn2', 'sourceColumnValue2'...'targetColumn')</p> <p>ReferenceTable Parameters:</p> <ul style="list-style-type: none"> <li>• RefTableSystemName - The system name of the reference table. This must be the system name, and cannot be a substitution token or nested function.</li> <li>• sourceColumn1 - The system name of the column from which to find values.</li> <li>• sourceColumnValue1 - The value within the column being pointed to. Must be added with the sourceColumn1 parameter.</li> <li>• sourceColumn2 - (<i>Optional</i>) The system name of the second column from which to find values.</li> <li>• sourceColumnValue2 - (<i>Optional</i>) The value within the second column being pointed to.</li> <li>• targetColumn - The system name of the column to return values.</li> </ul> <p>The formula returns back the first matching value ordered by row id.</p> <p>The ReferenceTable function can include an infinite amount of column/value pairs in the expression. Note that they must exist as a pair containing the column system name and the associated value expression.</p>			
Replace	Replaces every instance of a text found in a larger string with a new text and returns the string. Case sensitive.	Replace('My Blue Heaven', 'Blue', 'red')	My red heaven
<p>Replace Format: Replace('originalString', 'oldMatch', 'newText')</p> <p>Replace Parameters:</p> <ul style="list-style-type: none"> <li>• originalString - The string that is searched.</li> <li>• oldMatch - The string that is replaced.</li> <li>• newText - The string that replaces the oldMatch.</li> </ul>			
ResourceDemands	Returns all the resource demands on a project or all demands between two dates.	ResourceDemands(ProjectGateDate (2), ProjectGateDate (3))	Sum of all demands between these dates, ignoring units of meas-

Function	Description	Example	Result
	The ResourceDemands function is not supported in Accolade Portfolio Optimizer.		ure
<p>ResourceDemands Format: ResourceDemands([#startDate#], [#endDate#])</p> <p>ResourceDemands Parameters:</p> <ul style="list-style-type: none"> <li>• startDate - (<i>Optional</i>) The date on which to begin counting demands.</li> <li>• endDate - (<i>Optional</i>) The date on which to stop counting demands.</li> </ul>			
ResourceDemandsForPool	<p>Returns all of a project's resource demands for a specified pool.</p> <p>If dates are included, the sum is for demand between the start and end dates.</p> <p>The ResourceDemandsForPool function is not supported in Accolade Portfolio Optimizer.</p>	ResourceDemandsForPool(5, #4/1/2014#, #7/1/2014#)	Sum of demands on the specified pool between the specified dates
<p>ResourceDemandsForPool Format: ResourceDemandsForPool(poolID, [#startDate#, #endDate#])</p> <p>ResourceDemandsForPool Parameters:</p> <ul style="list-style-type: none"> <li>• poolID - The ID of the pool to calculate demands on. You can view the ID in a report on the RV_ResourcePools view.</li> <li>• startDate - (<i>Optional</i>) The date on which to begin counting demands.</li> <li>• endDate - (<i>Optional</i>) The date on which to stop counting demands.</li> </ul>			
ResourceDemandsForUOM	<p>Returns all of this project's demands that have the specified unit of measure.</p> <p>The ResourceDemandsForUOM function is not supported in Accolade Portfolio Optimizer.</p>	ResourceDemandsForUOM('FTE', #4/1/2014#, #7/1/2014#)	Sum of demands on the pools with the specified UOM

Function	Description	Example	Result
<p>ResourceDemandsForUOM Format: ResourceDemandsForUOM('Unit of Measure', [#startDate#, #endDate#])</p> <p>ResourceDemandsForUOM Parameters:</p> <ul style="list-style-type: none"> <li>Unit of Measure - The unit of measure of the pools to include.</li> <li>startDate - (<i>Optional</i>) The date on which to begin counting demands.</li> <li>endDate - (<i>Optional</i>) The date on which to stop counting demands.</li> </ul>			
Round	Rounds a value to the nearest integer or specified number of decimal places.	Round(3.257, 2)	3.26
RTrim	Removes trailing spaces from a string.	RTrim ({*METRIC:myString*})	A string without trailing spaces
RowValue	<p>Returns a value in the matrix column specified by the defined offset parameter.</p> <p>This function allows you to prorate across a matrix to identify values in certain cells.</p> <p>This is a self-referencing function that can only be used in matrices.</p>	RowValue(-1,'mxYear2financials')	The value in the cell prior to the 'mxYear2financials' column to which the metric is applied.
<p>RowValue Format: RowValue('Offset', 'ColumnSystemName')</p> <p>RowValue Parameters:</p> <ul style="list-style-type: none"> <li>Offset - An integer less than 0. Any negative value indicates the number of rows above the current row to retrieve a value from. For example, if the formula is being evaluated for row 4, and you need the value in row 3, use -1 as the offset value. Used to propagate down a matrix column or across a row in inter-row dependencies. To reference the current row, use a matrix metric token.</li> <li>Column System Name - The system name of the matrix column containing the cell to reference.</li> </ul> <p>These parameters cannot be nested functions or use substitution tokens.</p>			
Search	Returns how far from the start of a string a contained string was found. Case insens-	Search('blue', 'An attractive Aqua Blue dye', 5, 30).	20

Function	Description	Example	Result
	itive.		
<p>Search Format: Search('findString', 'withinString', [startIndex, length])</p> <p>Search Parameters:</p> <ul style="list-style-type: none"> <li>• findString - The string to find.</li> <li>• withinString - The string in which to search for the findString.</li> <li>• startIndex - (<i>Optional</i>) Number of characters from the beginning of withinString to start searching. Minimum value is 1.</li> <li>• length - (<i>Optional</i>) Number of characters from the startIndex to search.</li> </ul>			
SecurityList	Returns either the security list value display name or the security list value system name at a specified level in the list.	SecurityList(1,3,2,2)	Returns the first two security list display names in the second level of security list three.
<p>SecurityList Format: SecurityList(returnValueType,listNumber,listLevel,maxReturnCount)</p> <p>SecurityList Parameters:</p> <ul style="list-style-type: none"> <li>• returnValueType - Either 1 to return the security list display name, or 2 to return the security list system name.</li> <li>• listNumber - The security list to use. Acceptable values are 1, 2, 3, 4, or 5. The number entered must correspond to an existing security list. For example, if your system configuration only uses three security lists, acceptable values are 1, 2, or 3.</li> <li>• listLevel - The level in the security list tree to return values from. If the returned value exceeds 500 characters, the returned value includes as many complete security list level names that fit within 500 characters. This cannot be a substitution token.</li> <li>• maxReturnCount - The number of values to return in a delimited string, if more than one value is found in the security list and level specified. A maximum of 500 characters is returned. Only full security list level names are returned.</li> </ul> <p>Additional SecurityList Examples:</p>			

Function	Description	Example	Result
<p>ALL Locations</p> <p>Europe</p> <p>    France</p> <p>        Paris</p> <p>        Lille</p> <p>    England</p> <p>        London</p> <p>        Birmingham</p> <p>North America</p> <p>    Canada</p> <p>        Montreal</p> <p>        Calgary</p> <p>    USA</p> <p>        Denver</p> <p>        Houston</p> <p>Using the security list defined above, for a project that is assigned Europe, Paris, and USA:</p> <ul style="list-style-type: none"> <li>• SecurityList(1,1,2,2) - Returns Europe North America</li> <li>• SecurityList(1,1,3,2) - Returns France USA</li> </ul>			
Sign	Returns a value indicating the sign of a number.	Sign(-13)	-1
Sin	Returns the sine of the specified angle.	Sin(0)	0
Sqrt	Returns the square root of a specified number.	Sqrt(4)	2
SubString	Returns a string beginning a specified distance from the start of the string that contains it.	SubString('My Blue Heaven', 4, 10)	Blue Heaven
<p>SubString Format: SubString(withinString, startIndex, [length])</p> <p>SubString Parameters:</p> <ul style="list-style-type: none"> <li>• withinString - The string that contains the substring.</li> <li>• startIndex - Number of characters from the beginning of withinString that the substring begins. Minimum value is 1.</li> <li>• length - (<i>Optional</i>) Number of characters to include in the returned substring. If not present, returns all characters after start index.</li> </ul>			
Sum	Totals the returned val-	Sum(1, 5, 6)	12



Function	Description	Example	Result
	ues.		
SysProjectID	Returns the system ID of the reference project.	SysProjectID()	
Tan	Returns the tangent of the specified angle.	Tan(0)	0
TeamMember	Returns a team member's name, function, email address, or user login.	TeamMember (2,'FinanceLeader',3)	The team member's name that is assigned to the Finance Leader function in the project.
<p>TeamMember Format: TeamMember(lookupMethod,'lookupValue',returnValueType)</p> <p>TeamMember Parameters:</p> <ul style="list-style-type: none"> <li>lookupMethod - The method used to match a team member to return. <b>1:</b> row Index, <b>2:</b> function system name.</li> <li>lookupValue - The value of the index or function you want to use to find the team member. If the lookupMethod is set to <b>1</b>, enter an integer number representing the row in a list of team members arranged in alphabetic order by team member first name. Any functions without a team member assigned are sorted to the top of the list, and assigned team members follow in alphabetical order. Therefore, the returned team member could be None, indicating no team member is assigned at that row. If the lookupMethod is set to <b>2</b>, enter the function system name to return the value for the primary team member for that function. If no primary user is associated to the function, no value is returned.</li> <li>returnValueType - The information to return for the matched team member. <b>1:</b> Function Name, <b>2:</b> Email, <b>3:</b> Name, <b>4:</b> User Login.</li> </ul> <p>Additional TeamMember Examples:</p> <ul style="list-style-type: none"> <li>TeamMember(1,3,3) - Returns the name of the team member that is listed in the third from of an alphabetical list of team members. If the third row is a function with no leader, no name is returned. Note that the lookupValue does not have to be enclosed in single quotes when looking up by row index.</li> </ul>			
Trim	Removes all spaces from a string except for single spaces between words.	Trim ({*METRIC:myString*})	A string without leading or trailing spaces
Truncate	Returns the integral part of a number.	Truncate(1.7)	1
Upper	Returns a text string with all upper case.	Upper('Hello')	HELLO

## Custom Format for Number Metrics

A custom number format specifies how a number metric displays in an Accolade field code in a Word or PowerPoint document, or in quick grids.

Metric values in Accolade or in Excel documents are not affected. Excel has its own number formatting capabilities. Set the number format of the cell in which a field code applies to format numbers in Accolade fields in Excel. For information about formatting numbers in an Excel document, see the Excel online Help.

A metric with a custom number format that is attached to a quick grid will only use that format if the grid cell is read only.

A custom number format creates masks or patterns that show how numbers display. If a user enters a number in Accolade that differs from the pattern, the value displays according to the pattern. For example, if a user enters 89.453 in a metric with the custom number format **##.##**, the number displays in Word as 89.45. The actual value, as entered and stored in Accolade remains the same.

To create a custom number format, use the guidelines and examples in the table below and enter the format in the **Number Format** field when [defining a number metric](#). Number metrics without a custom format display exactly as they are stored in Accolade.

Use the following rules and guidelines to build a custom number format.

	Characters, Notes, and Examples
To display significant digits but not insignificant zeroes.	<p><b>Character:</b> #</p> <p><b>For example:</b> <b>##.##</b> displays the following:</p> <p>6.357 as 6.36            125.3 as 125.3            125.300 as 125.3            0.678 as .68</p>
To display insignificant zeroes if a number has fewer digits than there are zeroes in the format.	<p><b>Character:</b> 0</p> <p><b>For example:</b> <b>00.000</b> displays the following:</p> <p>.62 as 00.620            6.03 as 06.030            125.72000 as 125.720</p> <p>Trailing zero formatting is only applicable to Portfolio Optimizer, project history, and smart documents.</p>
To mark the location of the decimal placeholder.	<p><b>Character:</b> . (period)</p> <p>Enter a period for the decimal placeholder even if you are working in a region that uses a different symbol. Each user's computer displays the symbol appropriate to their selected region.</p>
To place the location of the thousands separator	<p><b>Character:</b> , (comma)</p> <p><b>For example:</b> <b>#,###</b> displays the following:</p>

	Characters, Notes, and Examples
	<p>1234 as 1,234 1234.56 as 1,235 1,234 as 1,234</p> <p>Enter a comma as the thousands separator even if you are working in a region that uses a different symbol. Each user's computer displays the symbol appropriate to their selected region.</p>
To add standard text to the number format	<p><b>Character:</b> 'text'"</p> <p>Enclose the text in single quotation marks. Precede the currency value with a variety of currency symbols or add text.</p> <p><b>For example:</b> #.00 'dollars' displays 17 as 17.00 dollars.</p>
To add supported single characters	<p><b>Characters:</b> \$ + ( ) : ^ ' { } &lt; &gt; = - / ! &amp; ~ (and the space character)</p> <p>Add these characters before or after the number format <i>without</i> using double quotes.</p> <p><b>For example:</b> \$#,###.## displays 1234.56 as \$1,234.56</p>
To add a single characters	<p><b>Character:</b> \</p> <p>Insert single characters, with some exceptions, preceding the character with a backslash (\). <i>Excluded</i> characters include date and time formatting characters (d, t, h, m, etc.), numeric formatting characters described above (#, 0, comma, period, etc.) and string formatting characters (@, &amp;, &lt;, &gt;, and !).</p>
To display a percentage	<p><b>Character:</b> %</p> <p>Enter % as the final character in the format. The value is multiplied by 100, and then the formatting rules (for # and 0, etc.) are applied.</p> <p><b>For example:</b> #.0% displays the following:</p> <p>0.4567 as 45.6% 0.45 as 45.0% 1.453 as 145.3%</p> <p>###% displays the following:</p> <p>0.45678 as 45.68% 0.45 as 45% 0.456 as 45.6%</p>

## Building a Number Format with Multiple Sections

A number format can have up to three sections, separated by semi-colons.

- A one section format applies to all values. For example, \$#,###.## displays positive and negative values the same way.

- In a two-section format, the first section is for positive values and zeroes, and the second section is for negative values. For example, **\$\$,###.##; (\$#,###.##)** displays 16.50 as \$16.50 and -16.50 as (\$16.50).
- In a three-section format, the first section applies to positive values, the second to negative values, and the third to zeros. For example: **\$\$,###.##;(\$#,###.##);0.00** displays zero as 0.00. In order to prevent a zero from appearing, place a single # in the third section.

## Financial Data Metrics

Financial data metrics display metric values corresponding to a project's financial information, and are typically used to assess the financial state of a project. To view the financial data metrics, navigate to the **System > Content Sources > Metrics** page, click on the **Category** drop-down and select **Core Cash Flow**.

In Accolade, financial data metrics are system generated, and hence, do not need to be created anew and cannot be deleted. However, if required, these metrics' field information can be edited, with the exception of the **System Name** and **Data Type** fields.

**Note:** All system generated metrics begin with a tilde (~).

Additionally, when a project is integrated with Acclaim Projects, actual and planned costs are sent back and forth between the two applications. This allows the volumes of financial information stored in Acclaim Projects to be subtotaled and sent to Accolade daily, where it can be rolled up into a single line to make it easy to see monthly totals.

**Note:** Acclaim Projects is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.

## Tracking Metric Change History

For historical and tracking purposes, select metrics to track their history including when a metric value changed, who made the change, where the change was made, and the value of the metric before and after the change. Metric history is available for reporting purposes.

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**Important!** Tracking metric history has the potential to create a large amount of history information. Consider carefully which metrics require history tracking, and track only those you need for historical purposes.

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### To set a metric for tracking history:

1. [Create a metric](#).
2. Select the **Track History** check box.
3. Click **Apply** to save your changes.

## Metric History Reporting

Metric history is available for reporting using the **Metric Change History** column set available in the **Projects** subject in Accolade Online Reporting and in the functionality available in the Accolade Office Extensions add-in. Use the columns available in the **Trended Metric History** column set available in the **Projects** subject to trend metric values as gate decisions and project migration events occur. To trend metric history for other system events, contact [Sopheon Customer Support](#).

The columns available in the **Trended Metric History** column set provide the ID of the stage within a project where the update was made. Stage IDs correspond to the placement of the stage in the Phase Gate sequence in the project. For example, a Stage ID 1 indicates the first stage; 2 indicates the stage pair that follows the first gate, and so on. Using a Stage ID column in the report provides insight into a metric value at a particular stage in the project without having to map a date to a stage duration.

See "[Creating Online Reports within Accolade](#)" on page 266 and "[Projects Subject](#)" on page 666 for information about creating a report and the columns available within the **Projects** subject to create a trended view.

## Capturing Large Data Strings in Accolade

Accolade provides the following ways to capture large pieces of data as free-form text within a project.

### Long String Metrics

Long string metrics act the same as [String metrics](#), but have a 2 GB data limit if Rich Text is enabled or a 2000 character limit if Rich Text is not enabled. Long String metrics can provide data and status and are available for inclusion in forms, reports, templates, matrices, quick grids, and other places within the application.

These metrics can contain rich text formatting to format text with elements such as bold, italics, and into lists. Like other metrics, these metrics can be associated with a process model for display and updating within a project, and be included in quick grids added to deliverables and activities.

### Extended Project Data Fields

To capture data strings that exceed 2000 characters in length, enable one or more **Extended Project Data** fields within the metadata in a process model. These fields are available to add to forms, reports, templates, quick grids, and other places within the application. However, they are not available to a matrix, matrix grid, or reference table. Use these fields for areas where you require additional characters, such as an extended description or as part of a layout for an idea campaign.

Process Designers enable and name the **Extended Project Data** fields in each process model. Each process model can have up to ten fields enabled, and each has a configurable display name and the ability to set where the field is available and editable in a project.

As you implement **Extended Project Data** fields in templates and other places, understand that a large number of fields with a large amount of data in a project can affect system performance when loading and saving information. In addition, external applications (such as Word or Excel) and network configurations may have their own size limits as well.


## Securing Metrics by User Role

Your company may have confidential metrics, such as those that contain financial data, which you want to keep secure, and ensure are only available to authorized users. Securing metrics allows you to create metrics that are only visible to a specific set of user roles.

Consider the following when assigning user role visibility settings to metrics:

- If multiple roles are assigned to a metric, a user only needs one of the assigned roles to access the metric.
- If a user does not have one of the assigned roles, the metric is hidden from any place it displays within Accolade. For example project pages, status reports, quick grids, Planning views, and Portfolio Optimizer. Consider using a combination of metrics restricted by user role and deliverables restricted by user role to achieve the correct level of security within a project.
- If a user does not have one of the assigned roles and the metric is included in a report created with the Accolade Office Extensions add-in or in Accolade Online Reporting, the metric value in the report is blank. However, the metric value is available in reports created using Dashboards for Accolade.
- If a metric is set as required on project creation, ensure that Process Managers are granted visibility to the metric. Without visibility, the Process Manager is unable to create projects using features that contain the required metric.
- Ensure metrics that are set to edit within a project are visible to the user roles that needs to update those values.

#### To secure a metric by user role:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create any metric type.
4. In the **Restrict to These Roles** field, select the user roles that have visibility to the metric.  
To leave the metric open to all user rules, leave all user roles unchecked or check all the user roles.
5. Click **Apply** to save your changes.

#### Notes:

- If a quick grid is set to create and publish PDF versions and also contains secured metrics, the PDF versions display the metrics regardless of the security settings. That is,


the generated PDFs do not respect metric security and can be viewed by users who may not have the user roles to view specific metrics. Do not select **Publish PDF** in the quick grid configuration if you want to ensure the security of certain metrics. See "[Creating Quick Grids](#)" on page 173 for more information.

## Scheduling Metric Calculations

To ensure metrics calculate and to prevent unnecessary recalculations, Process Designers have the ability to assign events to define when and how often a metric will calculate. Assigning a metric to calculate at a scheduled occurrence or a project event limits disruption to the system and minimizes data buildup of metrics recalculated during other Accolade actions. While metrics may be assigned to multiple events or occurrences be cautious when configuring metrics to prevent duplicating calculations. Additionally, if metrics are assigned to calculate on any associated change, the metrics will recalculate on specific actions or linked updates.

The procedure below describes how to assign metrics to calculate at a specific time or event. For information about calculated metrics see "[Creating Metrics Using Expressions \(Calculated Metrics\)](#)" on page 135.

### To assign a metric calculation event:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the metric list, search by the metric name, system name, or category.
2. Do one of the following:
  - **To add a new metric** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing metric** - Click the name of the metric to open it for editing.
  - **To create a metric based on an existing metric** - Click  in the **Copy** column to create a copy that can be used as a base to build a new metric.
3. Create the basic metric and click the **Calculated Formula and Events** tab.
4. Select any of the following to set when calculations occur:
  - Calculate on any associated change.
  - On project events.

Event	Description
<b>Create</b>	Set a metric to calculate when a project is created in Innovation Planning, a layout, from the Workspace menu Add New, WebAPI, and Idea Submission.  Ensure metrics scheduled to calculate only on project create do not reference team leader metadata if the default project manager metric is set.

Event	Description
<b>Migrate</b>	Set a metric to calculate when a project migrates. The calculation occurs on the original project at the time of migration before the project is closed.
<b>Re-Open</b>	Set a metric to calculate when a project that was previously closed is reopened. If a model has changed while the project was closed, a metric may not calculate correctly when the project is active again.
<b>Close</b>	Set a metric to calculate when a project closes to ensure metric values are finalized. Once a project is closed metrics will not calculate again.
<b>Phase Change</b>	Set a metric to calculate when a project moves forward or backwards in phases. Project phases move forward when a gate decision is set to Go or Conditional Go. Project create does not constitute a phase change for scheduled metric calculations. Project complete constitutes a phase change for scheduled metric calculations. When the final gate has been set to Go, the scheduled phase change metric will recalculate.

- Schedule date and time events.

All dates and times are configured and based on the local time of the application server.

Event	Description
<b>Daily</b>	Schedule a metric to calculate at a specified time each day. Consider the quantity of metrics selected to calculate daily.
<b>Monthly</b>	Schedule a metric to calculate at the same time of day, on the same day of each month.
<b>End of Month</b>	Schedule a metric to calculate at the same time each month. The end of month date dynamically changes based on the date each month falls on. For example, a metric will calculate on March 31st and April 30th, as April 31st would be invalid.
<b>Quarterly</b>	Schedule a metric to calculate at the same time every three months from a specified month.
<b>Yearly</b>	Schedule a metric to calculate annually on the same date and time.

5. Click **Create** to create the new metric or **Apply** to save changes to an existing metric.




**Notes:**

- More than one occurrence or event may be assigned to a single metric.
- Due to the disruption calculations may have to the system, schedule time intervals to occur when traffic on the server is minimal.
- If a metric is assigned to calculate on project migrate and project close, the metric will only calculate once.

## Removing and Deactivating Metrics

As your company's needs for metrics change over time, Process Designers and Administrators can remove or deactivate metrics that are no longer required for projects at your company. You can remove metrics from projects while retaining their history, deactivate a metric, or remove a metric completely from Accolade, which also removes any data associated with the metric.

 For more information, see [How Changing Process Models Affects Open and Closed Projects](#) to understand what changes are applied to open and closed projects.

### Removing Metrics from Projects While Retaining History

If you have a metric that is no longer in use but whose value and project history is important to retain, hide the metric from displaying anywhere in the project where it could be confused as still being in use.

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**Important!** If you want to retain the value and project history, do not deactivate the metric by deleting it from the process model or by deleting the metric from Accolade.

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#### To remove a metric from a project while retaining its value and project history:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the process model list, search by the process model name, system name, or class.
2. Click the name of the metric to open it for editing.
3. For each process model in the Models section, clear the drop-downs for each area of the project so neither **Edit** nor **Show** display.
4. Click **Apply** to save your changes.

### Deactivating Metrics

If you have a metric that is not ready for use in configuration or is not currently in use, you can deactivate the metric. Deactivating the metric keeps the metric in Accolade and also maintains project history.

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**Important!** You can only deactivate metrics that are not in use on any process model, including deleted models that still have projects associated with it. If you remove a metric from a process model, its value and project history are removed from open projects, and the metric is removed from any location where it displays in both open and closed projects.

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Metric values that were set in closed projects remain in Accolade and are available for reporting purposes.

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Do one of the following to determine if a metric is in use on a model:

- **For active and inactive models** - From the **System** menu, select **Content Sources > Metrics**. Click the name of the metric you want to deactivate and view the **Models** list. The models that contain the metric display.
- **For deleted models with associated projects** - From the **Workspace** menu, select **Charts & Reports**. Click **Add New** and [create an online report](#) that contains the following configuration:
  - **Columns** - From the Models subject, add the **Model Name**, **Model Deleted**, **Metric Display Name**, and **Metric System Name** columns. You can add additional columns to the report, as necessary.
  - **Filters** - Create a filter on the **Metric Display Name** or **Metric System Name** columns.  
For example, to search for the Comments - R&D metric, create a filter that contains the word "comments" or "R&D" to return a list of models that contain that specific metric. You can also create a filter on the **Model Deleted** column to return only information about metrics on deleted models.

#### To deactivate a metric:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the process model list, search by the process model name, system name, or class.
2. Click the name of the metric to open it for editing.
3. Clear the **Active** check box.
4. Click **Apply** to save your changes.

#### Removing Metrics Completely from Accolade

If a metric is no longer in use and the project history is no longer required, you can remove the metric completely from Accolade.

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**Important!** When a metric is deleted from Accolade, any project data associated with the metric is also deleted.

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#### To remove a metric from Accolade:

1. From the **System** menu, select **Content Sources > Metrics**.  
To narrow the process model list, search by the process model name, system name, or class.
2. Click the name of the metric to open it for editing.
3. Click **Delete**.

**Notes:**

- You cannot delete a system-generated metric or matrix metric.
- If deactivated and removed metrics are part of deliverables and activity conditions, disable the condition and remove the condition assignment.
- Removing a metric that is included in reports prevents the data from refreshing. A report with a deleted metric cannot be updated until the invalid metric is removed.

## Matrices for Project Data Analysis Overview

A matrix is a collection of metrics intended to model complex relationships between different data types. For example, a matrix could show how several aspects of project performance change over time. Matrices show how one or more metrics changes or is expected to change in relationship to changes in critical factors such as time or location. A matrix can also be a project management tool. For example, to assign action items to members of a project.

Administrators or Process Designers create metrics, flag them as being available to a matrix, and define matrices. Process Designers assign matrices to deliverables or activities in process models. Project Managers and document owners have access to matrices within projects through an MS Excel template or on a grid within a deliverable or activity.

### Combination Matrices

A matrix added with a Smart Excel template is available to any quick grid that is associated with that matrix in the project. That is, a Smart Excel template on one deliverable could be used to populate a set of rows in the matrix in a quick grid in a different deliverable.

### Filterable Matrices

You can create filterable matrices that are associated with multiple documents in the same project, allowing multiple users to work on the same matrix without overwriting each other's entries. Using matrix metric filters in deliverables and activities within a model, you can:

- Delegate the completion of a matrix to multiple team members through separate deliverables and activities within a model.
- Set only portions of a matrix for viewing or editing.
- Provide additional safeguards against unintended matrix data updates.

## Creating Matrices

Create a collection of metrics that allows users to track one project's metrics values through time or to create other types of complex comparisons of a project's metrics.

**To create a matrix:**


1. From the **System** menu, select **Content Sources > Matrices**.

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

2. Do one of the following:
  - **To add a new matrix** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing matrix** - Click the name of the matrix to open it for editing.
3. Complete the following to identify and describe the matrix:


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

Field	Description
<b>Display Name</b>	Enter a name, up to 64 characters long, which identifies the matrix.
<b>System Name</b>	Enter a unique, shorter name that identifies the matrix in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among reference tables and can contain only letters (English alphabet), numbers, and the underscore.
<b>Category</b>	Enter or select the group to which this matrix belongs.  Use categories to organize like matrices together. For example, you may choose to group all the matrices used for financials into the same category, in order to separate them from matrices used for other purposes. <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	Enter a description of the purpose or nature of the matrix. This description helps other users identify the matrix throughout the system.
<b>Order</b>	Enter a number to specify the matrix's place when it displays in a list of matrices. Lower numbered matrices display higher in the list.
<b>Active</b>	Select the check box when the matrix is ready to use in projects.
<b>Available to Business Intelligence Tools</b>	Select this check box to enable the matrix for use in your organization's business intelligence application.  💡 If the matrix is selected for inclusion in a portfolio snapshot, you cannot clear this option.  Rich text matrix metrics cannot be made available to Business Intelligence Tools.

Field	Description
<b>Available to Reporting</b>	<p>Select this check box to enable the matrix for use in reports created using the Accolade Office Extensions add-in, Accolade online reports, and within snapshots.</p> <p> If the matrix is selected for inclusion in a portfolio snapshot, you cannot clear this option.</p> <p>If a matrix is made available to reporting, refer to the <b>Included in Reporting</b> column in the <b>Associated Metrics</b> section to see the included metrics. Rich text matrix metrics cannot be made available to reporting.</p>
<b>Portfolio Optimizer</b>	<p>Select one of the following to indicate the matrix availability within Portfolio Optimizer. The selections in this field are available only if one of the metrics in the matrix is set as unique.</p> <ul style="list-style-type: none"> <li>• <b>Not Available</b> - Not available in Portfolio Optimizer.</li> <li>• <b>Reporting Only</b> - Can be included in reports but is not visible in Portfolio Optimizer. This option allows you to create matrices for reporting without having to add them to the list of available columns in Portfolio Optimizer.</li> <li>• <b>Edit</b> - Visible and fully available in Portfolio Optimizer.</li> </ul>

4. In the **Associated Metrics** section, select the metrics to include in the matrix.

Click **Add New** to search for metrics to add to the matrix. Only metrics [set to be available in a matrix](#) are available in the **Metrics** field. To filter the metric list, select a name in the **Name** field and category in the **Category** field.

 To [define a new metric](#) while building a matrix, select **Add New Metric** in the **Metric** field. To reorder metrics after you have added them to the matrix, click a row in the **Associated Metrics** section and drag it up or down to its new location.

5. Repeat step 4 as necessary to add additional metrics to the matrix.

6. Do the following for each metric, as appropriate for the matrix:

- **To indicate that a metric should have a unique value in each row** - Select the **Unique** check box to enforce unique values for each metric contained in the matrix. Metrics correlate to columns in Excel templates, and unique metrics ensure columns are not duplicated in the workbook. If a matrix is set to edit in Portfolio Optimizer or Innovation Planning, only one relative date metric can be set as unique. For Portfolio Optimizer matrices, also indicate the order in which the unique metrics display from left to right in the **Portfolio Column Header** field.


Multi-select lists and calculated metrics within the matrix cannot be set as unique.

If using the calculated metric expression CurrentMatrixValue in a matrix and updating the matrix in Excel, you must uniquely identify other matrix rows by flagging metrics as unique. If

matrix columns are not unique or the Excel workbook contains duplicate columns, the Smart Excel template does not update, upload, or publish back to Accolade.

- **To indicate a metric as a filter for the matrix within a model** - Select the **Filterable** check box if the metric is a filter for a matrix to specify which rows of the matrix are editable or displayed in a deliverable or activity. Making a metric filterable in a matrix makes it possible for different document owners to edit different parts of the matrix based on the content of the filter metric. Multiple metrics in the matrix can be filterable. This option is only available for List type metrics.
7. Click **Apply** to save your changes.
  8. *(Optional)* Follow the instructions listed in "[Restricting Configuration for Matrices](#)" on page 36 to configure access group restrictions.
  9. *(Optional)* Click **Process Model Usage** on the **Security** tab to see the list of process models that the matrix is associated with. The list includes all process models the matrix is included in, as well as links to the [process model's component tree](#) pages you have Edit access to.

#### Notes:

- To delete a matrix, display the matrix and click **Delete**. Take caution when deleting matrices, as the data saved within those matrices, such as the system-generated **Voting Matrix** or data in existing portfolio snapshots, is deleted with it.
- To delete a metric from a matrix, display the matrix and click  next to the metric in the **Associated Metrics** section.
- Accolade Portfolio Optimizer is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).
- The **Included in Reporting** and **Included in Snapshots** columns in the **Associated Metrics** section are read only.

## Creating Matrices for Multiple Owners

Create a matrix that more than one person can work on without overwriting changes from other users. The matrix is assigned as the template of more than one deliverable or activity, and each document is filtered so that its owner can only upload edits on part of the matrix.

This process can also be used to create a matrix for a single owner in multiple stages.

### To create a matrix for multiple owners:

1. [Create a matrix](#) with one or more filter metrics along with the metrics that contain the data to be updated.

The filter metrics specify which parts of the matrix a given user can modify. Filter metrics can be either list type or multi-select list type, and the list can be either entered manually or selected by query. Select at least one **Filterable** check box on the Matrix page to enable that metric to filter the matrix it is in.

2. [Setup a Smart Excel document template to update a matrix.](#)
3. [Associate the matrix with the models](#) that contain the deliverables or activities to update.  
Select the same matrix template for all the documents that are used to update the matrix.
4. In the deliverable and activity definitions within the model, [assign the metric filters for the matrix.](#)

The filtering options allow document owners to update only the rows that contain a specific value in the filter metric. One of the filtering options allows the owner to see all of the matrix while the other allows the owner to see only the rows they can update.

- 💡 Since each document is intended for a different member of the project team, it would be helpful to indicate in the document name or description what content is editable within the matrix.

#### Notes:

- The Project Manager and Process Managers with Manage Process rights can change the filtering options for deliverables and activities within in the project, and the deliverable owner can change them for a deliverable's activities.

## Creating Matrices for Use in Portfolio Optimizer

Create a collection of metrics to track a project's metrics values through time or to create other types of complex comparisons of a project's metrics. For example, create a matrix to track the sales and costs of a project across quarters or years. Portfolio Managers can then use Accolade Portfolio Optimizer to view, filter, and chart matrix information across multiple projects at once. The matrix values are viewable as columns (similar to metric values) in Portfolio Optimizer, for projects in a portfolio or in a scenario.

Verify your matrices as you create them, and existing matrices prior to enabling them for Portfolio Optimizer, to ensure that a manageable number of columns are available within Portfolio Optimizer.

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**Important!** Deleting metrics from a matrix that is in use in Portfolio Optimizer causes the loss of scenario data based within that matrix. Use careful consideration prior to deleting metrics from matrices, and matrices that are set as **Available to Portfolio Optimizer**.

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### To create a matrix for use in Portfolio Optimizer:

1. [Create a matrix](#) and ensure that the configuration meets following requirements:
  - At least one metric within the matrix is set as **Unique**. If more than one metric is set as unique, also indicate the order in which the unique metrics display from left to right in the **Portfolio Header Column** field.
  - The **Available to Portfolio Optimizer** option in the Portfolio Optimizer section is set to **Edit**. This field is only enabled if a metric is marked as unique.
2. *(Optional)* To limit the metrics based on the matrix that are available in Portfolio Optimizer, select the **Filterable** option for one or more list metrics. In the **Only Include Rows That Match** field in

the **Portfolio Optimizer** section, select which list item values to include when the matrix is converted to metrics in Portfolio Optimizer.

3. Save the matrix and apply it to a deliverables as necessary using a Smart Excel template or a quick grid.

**Notes:**

- A matrix available to Portfolio Optimizer can have only one unique relative date metric.
- Multi-select list metrics cannot be set as unique.
- Rich text metrics are not available in Portfolio Optimizer.
- Accolade Portfolio Optimizer is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).



## Quick Grids for Data Collection Overview

A quick grid is a collection of one or more customizable grids that is associated with a deliverable or activity that provides another location to enter information during a project. Quick grids are added to deliverables and activities in a process model, in much the same way as a template.

Adding the appropriate metrics and other data collection points to a grid allows the assigned deliverable or activity owner to conveniently manage the metrics and data collection directly on the screen, without having to download a template, update the document and save the results to Accolade. Quick grids also allow other members of the project to view the specific metrics and data associated with each deliverable or activity in a read-only version of the grid.

A quick grid can contain one or more of the following grid types:


- **Standard Grid** - Standard grid that includes metrics to update and other components such as buttons and fields to enter text.
- **Matrix Grid** - Matrix grids include columns of an existing matrix, rather than a cell-by-cell grid definition and allow deliverable and activity owners to add additional rows to the grid as necessary.

Process Designers associate quick grids to deliverables and activities in a process model. Any metrics referenced within the quick grid, and the matrices in matrix grids, are associated automatically with the model when the grid is added to a deliverable or activity. Quick grids are only editable during the current project stage. It may require detailed planning to ensure the necessary metrics can continue to be managed in quick grids throughout the project.

### Creating Quick Grids

Administrators and Process Designers with the Template Access role can create quick grids that Process Designers can add to deliverables and activities within a model. From there, deliverable and activity owners can enter and track information directly within a deliverable or activity in a project.

#### To create a quick grid:

1. From the **System** menu, select **Page Design > Quick Grids**.  
To narrow the quick grid list, search by the quick grid name, system name, or category.
2. Do one of the following:
  - **To add a new quick grid** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing quick grid** - Click the name of the quick grid to open it for editing.
  - **To create a quick grid based on an existing quick grid** - Click  in the **Copy** column to create a copy that can be used as a base to build a new quick grid.

- The access groups of the copied quick grid depend on the access groups of the user and the access groups of the quick grid being copied.
- If the user has edit permission to one or more of the access groups of the quick grid being copied, the result of that copy will have the access groups that both the user can edit and the quick grid is a member of.
- If the user does not have edit permission for any access groups of the quick grid being copied, the new quick grid will have the highest access group for which the user has edit access. For more information, see "[Designing the Access Group Hierarchy](#)" on page 25.

3. *(Optional)* - Select the **Protected Quick Grid** check box to prevent grid designers from being able to open and modify the grid in Accolade when grid protection is turned on.

The **Enable Quick Grids Protected Mode** parameter must be set at **1** and the check box for the appropriate quick grid must be selected for the quick grid to be protected. To edit a protected quick grid, Accolade Administrators must set the parameter back to **0**.

4. *(Optional)* - Select the **Create PDF** check box to generate a PDF of the quick grid contents associated to deliverables, activities, or layouts.

The quick grid automatically creates new, separate PDF versions every time a user modifies and saves the quick grid. PDF versions of quick grids associated to deliverables or activities automatically save as a deliverable or activity version. When a quick grid is embedded in a page layout pod and displays as a project page, the PDF version saves in the project's **Related Docs** page.

5. *(Optional)* - Select the **Publish PDF** check box to have PDFs of quick grids associated with deliverables, activities, and layouts published throughout Accolade. This check box is only available if you selected to create PDF versions above.

Publishing the PDF versions of quick grids allows project team members to search for the PDF in Accolade. Unpublished versions do not display to users outside of the project to which the quick grid is associated. This check box might already be checked if the **Default to New Versions** system parameter is enabled. Deselecting the check box overrides the parameter setting for the grid.

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**Important!** If a quick grid is set to create and publish PDF versions and also contains secured metrics, the PDF versions display the metrics regardless of the security settings. That is, the generated PDFs do not respect metric security and can be viewed by users who may not have the user roles to view specific metrics. Do not select **Publish PDF** in the quick grid configuration if you want to ensure the security of certain metrics.


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6. Select the **Active** check box when the grid is ready to use in projects.

Leave this check box clear until you have completed the design of the grid.


## 7. Complete the following information to identify and describe the grid:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the quick grid.
<b>System Name</b>	Enter a unique, shorter name that identifies the quick grid in queries, reporting views, Accolade Office Extensions, field codes, and other places in Accolade. The name must be unique among quick grids and can contain only letters (English alphabet), numbers, and the underscore.
<b>Description</b>	<p>Enter a description of the purpose or nature of the quick grid.</p> <p>This description helps other users identify the grid throughout the system.</p> <p> Click and drag the lower left corner of the <b>Description</b> field to view text appropriately.</p>
<b>Category</b>	<p>Enter or select the category to which this quick grid belongs.</p> <p>Leave this field blank to add the quick grid to the <b>Default</b> category. Use categories to organize like grids together. For example, if there are a large number of grids assigned to add to a deliverable that collects financial analysis, a Process Designer can use a category selection to locate the finance grids when designing and creating models.</p>
<b>Configuration Access Groups</b>	Select the access groups to which the quick grid belongs. Process Designers with matching permissions will be able to edit and view quick grid or the data within its grids. The access groups displayed are based on the current user's access group permissions and the access groups the quick grid belongs to.
<b>Process Model Usage</b>	Click the <b>Process Model Usage</b> button to see the list of process models that the quick grid is associated with. The list includes all process models the quick grid is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.

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. Continue with the following tasks, as necessary, to design the grid:
  - ["Designing Standard Grids" on page 176](#)
  - ["Designing Matrix Grids" on page 177](#)
  - ["Adding Software Controls and Metrics to Quick Grids" on page 177](#)
  - ["Adding and Editing Quick Grid JavaScript Files" on page 180](#)
  - ["Changing Grid and Cell Display Properties in Quick Grids" on page 181](#)

**Notes:**


- To delete a quick grid, click  in the **Delete** column. The grid is removed from any process model and any deliverable or activity that uses the grid within a project.

## Designing Standard Grids

Add and configure one or more grids that combined make up a quick grid when added to a deliverable or activity. Add multiple grids and [matrix grids](#) to a single quick grid. Standard grids are built on a cell-by-cell basis and do not reference a matrix.

To create a new quick grid or to copy an existing grid, see ["Creating Quick Grids" on page 173](#).

### To design a standard grid:


1. From the **System** menu, select **Page Design > Quick Grids**.
2. [Create a new quick grid or open an existing quick grid](#).
3. Click the **Drag to Design** tab in the left panel of the Quick Grid Design dialog box.
4. Drag and drop **[Grid]**  in the canvas.
5. Complete all required fields in the pop up dialog to set the initial grid design:
  - **Name** - Enter the text that displays in the title bar when the quick grid displays in a deliverable or activity. The title should provide enough information so deliverable and activity owners can identify the grid.
  - **Rows** - Enter the initial number of rows in the grid
  - **Columns** - Enter the initial number of columns in the grid.
6. Click **OK** to set the initial grid design.
7. *(Optional)* Drag and drop additional quick grids from the **Drag to Design** tab onto the center canvas. Drag existing grids around the canvas to sort.

- 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.


## Designing Matrix Grids

**Note:** Users with the user roles listed to the right must also have the Template Access user role.

Add a matrix grid in the quick grid design that contains some or all the columns of an existing matrix. Matrix grids contain only two or three rows (depending on whether you choose to add a totals row). Deliverable and activity owners can add additional rows to the grid, as necessary.

-  The right-most column in a matrix grid is added automatically and contains a check box to allow deliverable and activity owners the option to delete a row. Do not modify the control in these cells. You can add a heading label and modify the shading of this column, as necessary.

### To design a matrix grid:

- From the **System** menu, select **Page Design > Quick Grids**.
- [Create a new quick grid or open an existing quick grid.](#)
- Click the **Drag to Design** tab in the left panel of the Quick Grid Design dialog box.
- Drag and drop **[Matrix]**  in the canvas.
- Complete all required fields in the pop up dialog to set the initial matrix grid design:
  - Name** - Enter the text that displays in the title bar when the quick grid displays in a deliverable or activity. The name should provide enough information so deliverable and activity owners can identify the grid.
  - Category** - Select the data category that populates the matrix grid.
  - Matrix** - Select the matrix this grid contains.
- Click **OK** to set the initial matrix grid design.
- (Optional)* Drag and drop additional quick grids from the **Drag to Design** tab onto the center canvas. Drag existing grids around the canvas to sort.
- 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.


## Adding Software Controls and Metrics to Quick Grids

**Note:** Users with the user roles listed to the right must also have the Template Access user role.

To create a new quick grid or to copy an existing grid, see ["Creating Quick Grids" on page 173](#).

**To add software controls and metrics to a quick grid:**

1. From the **System** menu, select **Security & Groups > Quick Grids**.
2. Click the name of the quick grid to open it for editing.
3. Click the **Drag to Design** tab in the left panel to display the data source options.
4. Indicate the data type to populate the grid cell by selecting either **Metric** or **Metadata** in the **Source Type** field.
5. If you selected **Metric** as the **Source Type**, select the appropriate metric category.

 Metrics appear in the list if the user has "Can Edit" access to the metric, the metric belongs to a child access group of the quick grid, or the metric is already attached to the quick grid.

6. To add metrics and metadata to the grid, do any of the following.
  - **Drag and Drop** - Drag a metric or metadata from the list in the left panel and drop it into a grid cell. A control defaults based on the metric and metadata type.

Data Type	Default Control
<b>Metric</b>	String: Text Input Number: Text Input Long String: Multi-line Text Input Multi-Select List: Paired List List: Drop Down Date: Date Selector
<b>Metadata</b>	Project Name: Text Input, Text Label, or Multi-line Text Input Project Description: Multi-line Text Box or Text Label Idea Submitter Name: Text Input, Text Label, or Multi-line Text Input Idea Submitter Email: Text Input, Text Label, or Multi-line Text Input Extended Project Data 1-10: Multi-line Text Box

- **Type Ahead** - Type metric and metadata field codes directly into the grid cell. A control defaults based on the metric or metadata. If the fast-entry input does not match a valid metadata or metric field code, the control defaults to formatted text. For a list of valid field codes, see ["Accolade Field Codes and Substitution Tokens" on page 765](#).
- **Select a Control** - Select a control type in the **Properties** tab on the right panel from the **Type** field. Data type details populate and vary based on the selected control type.

7. Navigate to the **Properties** tab in the right panel and enter the following information to further define or modify the data or control in the selected cell. Only certain fields populate based on the control type selected.

For all [control types](#), you must enter a unique system name, up to 64 characters long, which identifies the cell across all grids in the Quick Grid editor.

Additionally, you can change the control for the selected cell from the **Type** field which includes both the supported and unsupported controls associated with the metric or metadata selected.


**Note:** Use [custom number formats](#) to specify how a number metric displays in an Accolade field code in quick grid cells. Custom number formats only display for Text Box (number) controls.

For more information on control types and necessary properties, see the online Help.


**Note:** Calculated metrics display as read-only within a quick grid. You cannot add matrix metrics to non-matrix grids and the number format for matrix metrics is not supported in Microsoft 365 applications.

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.

#### To add a new metric while designing a new quick grid:

1. Click **New Metric** located at the bottom of the **Drag to Design** tab.
2. Fill in the necessary information to create a new metric. Click  in the right corner of the dialog to learn more about ["Creating Metrics" on page 117](#).
3. Click **Create** to add the new metric to the system. The new metric displays in the list of metrics available to add to the grid.
4. Reference the table in Step 6 above to add the new metric to a quick grid.
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 delete cell contents, click the cell and click  in the drop-down menu or click the cell and press **Delete**.
- Metrics added to a quick grid do not need to be individually associated with the grid's model. They are automatically added to the model when the Process Designer adds the grid to a deliverable or activity within the model.


- Controls within quick grids must have unique control system names when using multiple quick grids and JavaScript functions. If a quick grid contains duplicate control system names, the JavaScript function calls one at random and may not operate as intended.
- The **Enable Quick Grids Protected Mode** parameter turns on and off grid protection. To modify a protected grid, an Administrator must set the parameter to **0**.

## Adding and Editing Quick Grid JavaScript Files



Using JavaScript, associate functions with cell events, such as on mouse over, within a quick grid cell. Save the JavaScript functions used in quick grids in a JavaScript library file that is saved for an individual grid if only one grid uses those functions, or at a global level if multiple grids use the functions.

- 💡 It may improve performance to put some functions only in the local file, because if the global library file is large, it can affect the time it takes for the deliverable in the project to load.

### To add or edit a JavaScript library file for all grids:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Do one of the following:
  - **To add an existing file** - Click , select the JavaScript library file, and click **Open**.
  - **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**.



### To add or edit a JavaScript library file for an individual grid:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. Click the name of the quick grid to open it for editing.
  - 💡 The **Enable Quick Grids Protected Mode** parameter turns on and off grid protection. To modify a protected grid, an Administrator must set the parameter to **0**.
3. In the **JavaScript File** field, do one of the following:
  - **To add an existing file** - Click , select the JavaScript library file, and click **Open**.
  - **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 **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 delete a JavaScript file associated with an individual quick grid, select the quick grid to display its details. In the **JavaScript File** field, click  and **OK** to save changes.
- To delete a global JavaScript file, click  at the top of the Quick Grids page.

## Changing Grid and Cell Display Properties in Quick Grids

**Note:** Users with the user roles listed to the right must also have the Template Access user role.



Once you have created the quick grid and populated it with data, alter the grid and cell properties and appearance to help make them easier to navigate. For example, you may choose a bold font for a totals row in a matrix grid.



### Changing Grid Settings and Properties

Altering the appearance and layout of a quick grid allows you control of data and information presentation. Quick grids are viewable in project deliverables and activities that various Accolade users have access to view and edit, based on specific user roles. The procedure below discusses options and functions for modifying a grid's structure and appearance.

#### To refine a grid structure, appearance, and functionality:

- From the **System** menu, select **Page Design > Quick Grids**.
- [Create a new quick grid or open an existing quick grid.](#)
- To add, delete, or move rows or columns click the number of the column or row header to select the row or column and click the appropriate icon in the field.


  - Add row above or below.


  - Move row up or down.




 - Delete grid row.

  - Add column left or right.

  - Move column left or right.

 - Delete grid column.

 Matrix grids do not allow row functionality, meaning you cannot add, delete, or move rows in a matrix grid. Additionally, merged cells disable row functionality.

4. *(Optional)* To move a grid on the canvas, do one of the following:
  - Click  to the left of the grid header and drag it in the canvas.
  - Click the grid header to select the entire grid and click either  or  in the drop-down menu to move the grid.
5. Set the minimum or fixed height and width for grid rows and columns.

Click the corresponding column or row number to select it and navigate to the **Appearance** tab in the right panel to modify. You cannot enable both minimum width and fixed width for grid columns.

Field	Description
<b>Minimum Width</b>	Enter the minimum width of the column in pixels. The grid column width adjusts according to the controls in the cells; however it displays with a width no less than the minimum set.
<b>Fixed Width</b>	Enter the width of the column in pixels to have the column display with a forced width, regardless of what populates the cells.
<b>Minimum Height</b>	Enter the minimum height of the row in pixels. The grid row adjusts according to the controls and data that populate the cells.
<b>Fixed Height</b>	Enter the height of the row in pixels to have the row display with a forced height, regardless of what populates the cells.

6. Change what displays in the structure of the grid as necessary.
 

Click the grid header to select the grid and navigate to the **Properties** tab in the right panel to modify.

Field	Description
<b>Name</b>	Edit the grid name.

Field	Description
<b>System Name</b>	Edit the system name making it unique among quick grids and identifiable in queries, reporting views, and field codes. The name can contain only letters (English alphabet), numbers, and the underscore, and defaults to the grid name. On upgrade the system name defaults to "Grid" plus a number, making it unique throughout the system.
<b>Tooltip</b>	Enter a description of the grid or brief instructions for using the grid. The tooltip text is available for anyone interacting with the grid throughout the system.
<b>Tooltip Alignment</b>	Select the alignment of the tooltip icon within the cell.
<b>Show Grid Title</b>	Select whether the title displays on the grid in deliverables, activities, and layouts.
<b>Show Footer Row</b>	Select to add a row to the bottom of the matrix that can contain numeric totals and other buttons to perform actions within the grid.
<b>Hide Grid</b>	Select the check box to disable grids from displaying in deliverables, activities, and layouts.
<b>Collapsible</b>	Select the check box to allow deliverable and activity owners to collapse the grid, and select how the grid displays when a deliverable or activity is first displayed.
<b>Default to Expand or Collapse</b>	Select whether the grid displays as expanded or collapsed in deliverables, activities, and layouts.

7. Modify appearance aspects for the grid as necessary.

To change grid background and border appearance, click the grid header to select the grid and navigate to the **Appearance** tab in the right panel to modify.




Field	Description
<b>Background</b>	Select a background color, enter its hexadecimal color code, or enter its RGB or HSV value in the <b>Background Color</b> field.
<b>Borders</b>	Select a border style in the <b>Style</b> field and enter a border width. Select a border color, enter its hexadecimal color code, or enter its RGB or HSV value in the <b>Border Color</b> field.






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.



## Changing Cell Settings and Properties

Altering the appearance and layout of quick grid cell allows you control of data and information presentation. Quick grids are viewable in project deliverables and activities that various Accolade users have access to view and edit, based on specific user roles. The procedure below discusses options and functions for modifying a grid cell's structure and appearance.

### To refine a grid cell structure, appearance, and functionality:



- From the **System** menu, select **Page Design > Quick Grids**.
- Click the name of the quick grid to open it for editing.
  -  Use **Tab** to navigate between cells in a grid.
- To merge or split merged cells click the cells you want to alter and click the appropriate icon in the field.
  -  - Merge cells. You cannot merge cells in a matrix grid.
  -  - Split merged cells.
- To alter the appearance of grid cells, select a single cell or multiple cells to edit at once and navigate to the **Appearance** tab in the right panel to modify any of the following:

Appearance Aspect	Description
<b>Text</b>	<p>Select a text font such as Arial or Times New Roman in the <b>Font</b> field and a text size in the <b>Size</b> field. Choose to bold, italicize, or underline the text by selecting the appropriate icons. Select a text color, enter its hexadecimal color code, or enter its RGB or HSV value in the <b>Text Color</b> field. Cell text defaults to 13pt Noto Sans font.</p> <p>If a cell is editable, its text color is always black, regardless of the color set here.</p> <p> You can apply rich text elements to cells with formatted text controls and long string metric values by using markdown formatting.</p>
<b>Alignment</b>	<p>Click one or multiple alignment icons to position text within the cell. Cell text defaults left align and top align.</p> <p> - Left Align</p> <p> - Center Align</p> <p> - Right Align</p> <p> - Top Align</p>

Appearance Aspect	Description
	 - Middle Align  - Bottom Align
<b>Background</b>	Select a background color, enter its hexadecimal color code, or enter its RGB or HSV value in the <b>Background Color</b> field. If a cell is editable and contains a control, the control's background is always white, while the cell background color displays as set here.
<b>Borders</b>	Select a border style in the <b>Style</b> field and enter a border width. Select a border color, enter its hexadecimal color code, or enter its RGB or HSV value in the <b>Border Color</b> field.

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:**

- If the Control Type is set to **Rich Text**, the Text and Alignment sections are unavailable as users can customize the text directly from the rich text box.
- You cannot add matrix metrics to non-matrix grids and the number format for matrix metrics is not supported in Microsoft 365 applications.
- To delete a quick grid from the canvas, click the quick grid header and click  in the drop-down menu.
- To delete cell contents, click the cell and click  in the drop-down menu or click the cell and press **Delete**.
- The **Enable Quick Grids Protected Mode** parameter turns on and off grid protection. To modify a protected grid, an Administrator must set the parameter to **0**.

## Adding Color Conditions to Quick Grid Cells

Use color to condition grid elements based on predefined metric values. This allows you to visually represent metric values and ranges without using JavaScript. Additionally, cells update live with selected color properties as users update and modify metrics and cell values that meet conditions. For example, you may choose to condition cells with risk metrics greater than 5 to display as red. Grid cells with risk values greater than 5 display as red in the project, deliverable, or activity to which they are associated.

### To add color-conditional formatting:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. [Create a new quick grid or open an existing quick grid.](#)
3. Select the cell containing the metrics and values you want to condition. Condition values are evaluated against the selected cell's value in a case insensitive manner.
4. Navigate to the **Appearance** tab on the right panel and select the color picker for text, background, or border color.
5. Click the **Conditions** tab and click  to add a condition.
6. Select the color, enter its hexadecimal color code, or enter its RGB or HSV value in the color field.
7. Select the condition operator and enter the criteria that sets the condition.  
Enter a specific condition value matching the metric in the selected cell or enter a field code.  
Enter dates using the YYYY-MM-DD format.
8. Click away from the box to set the condition.
9. Repeat steps 5-8 to add additional conditions.


If multiple conditions are entered, each condition is treated individually and respected on a per-condition basis.

The cell displays the color of the first condition met and you can use the same color in different conditions for the same element property. For example, a cell selected to display as red if the value is greater than 0 can also be conditioned to display as red if the cell value is less than 10.

If conditioned cells do not meet any conditions, the default background, text, or border color displays.

10. 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 delete a condition, open the color picker where the condition is set and click the **Conditions** tab. Click  for the specific condition.

## Templates Overview

In Accolade, templates are the starting point for creating process documents for deliverables and activities, Excel reports, Project schedules, and other documents. Using templates provides consistency across similar documents across all the projects within your organization. Templates can exist for the following:

- Deliverables and activities
- Gate documents
- Online forms
- Idea forms
- Microsoft Project plans)
- Display images (currently supported for page layouts)
- Any document that your company uses as a template outside of Accolade

## Template Access

Anyone in your organization can create a document that you decide to use as a template. However, only Administrators and Process Designers with the Template Access user role can add templates to the Template Library, which is the repository for templates available within Accolade. Anyone with Template Access can view the templates that align with their access groups. Administrators and Process Designers that have Template Access have the ability to add, remove, edit, or view templates that they share access groups with and have edit rights in those access groups.

Other roles have no access to the Template Library; however, they can download template files when they start to work on their documents within a project.


## Smart Templates

A "smart" template is an Excel, Word, or PowerPoint file that includes Accolade data in the document, pulled from the Accolade database each time the template (or document version) is downloaded. Rich text metrics do not display in Excel or Word smart templates but they do display in PowerPoint.

Smart templates allow users to:

- Include the most up-to-date metric and project metadata values from the Accolade database.
- Maintain project metrics in deliverables by uploading values from the document to the database (Word files with specific-metric types only and specific Excel documents).
- Include the most up-to-date values from reference tables.

Accolade data is added to the document using Accolade field codes, which map data in the Accolade database to a place within the document, or named ranges to add Accolade online reports and other tables to Excel. Smart documents only work for documents that are uploaded into Accolade. Data does not refresh if the document is created as a link to an external document.

 A document can be "smart" and not be added to Accolade as a template in the Template Library.

The following document types can include field codes to become "smart" documents or templates:


- **Excel** - .xlsx, .xlsm, .xltx, .xltm
- **Word** - .docx, .docm, .dotx, .dotm
- **PowerPoint**- .pptx, .pptm, .potx, .potm, .ppsx, .ppsm

## Template Best Practices

Keep the following set of best practice recommendations in mind when creating templates:

- **Use the Base Templates Provided from Sopheon** - Each Accolade release contains a group of base templates on the [Base Templates Reference Page](#). Use these base templates as starting points for templates specific to your organization.
- **Use Descriptive and Unique Template Names** - Users need to be able to clearly distinguish the different template types and their uses. For example, Process Designers building models need to distinguish between templates used for files and those for online forms, and the difference between a Master Template such as the Excel Master template and other Excel templates available.



- **Use Categories to Help Identify Templates** - In addition to descriptive and unique template names, place templates of similar usage in categories to help users identify the correct template to use. For example, you may consider grouping templates by their base functions such as reporting or marketing analysis. Create and assign templates to categories when adding the template to the [Template Library](#).
  - **Use Template File Name Extensions** - Users who download a file deliverable from a project can easily save it by mistake to a temporary folder where it may be difficult to find again. If you ensure that file templates have the file extension of a template of the related application (such as .dotx for Word documents or .xltx for Excel documents), then users are prompted to save the file to an accessible location when they save the downloaded template locally.
  - **Verify Field Codes in Templates Prior to Adding Templates to the Library** - When you upload a template containing field codes to the library, mistakes in the name, such as {\*MD:PorjectNam\*} generate errors. However, mistakes in the pattern or source, such as {\*ProjectName\*} or [\*MD:ProjectName} simply display the field code itself in the template rather than displaying the relevant data when opened in a project.
  - **Specify Which Worksheets in an Excel File Contain Field Codes** - Accolade keeps track of documents using custom document properties that are created automatically when the template is first downloaded in an Accolade project. To improve the refresh speed of some Excel templates, use the **SGM\_RefreshFieldsOnWorksheet** custom document property to specify which worksheets within the file contain Accolade field codes. Refer to Microsoft's online Help for information about adding custom properties to files.
  - **Use the Template Library for Templates Beyond Accolade** - Use the Template Library to store not just templates used within Accolade, but also for templates used for documents not associated with the work you complete using Accolade. Add these types of documents to the library using the **Other** type.
  - **Use Access Groups to restrict templates to subsets of Accolade users** - Using access groups, templates can be configured to only be accessible to a subset of users.
-  Sopheon recommends that you store the master Excel template (**Report - Excel <version>.xltx**) in a separate category in the Template Library.

## Adding Templates to the Template Library

The Template Library is the repository for templates available for use throughout Accolade. Images added to the Template Library are available to image pods in page layouts. Administrators and Process Designers can also use the Template Library as a repository for templates that are useful across your organization, but that may not have a use as a deliverable, activity, gate document, form, or report within Accolade.

### To add a template to the Template Library:

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

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


2. Do one of the following:
  - **To add a new template to the library** - Click **Add New** in the top right corner of the page.
  - **To edit an existing template** - Click the name of the template to display its details page for editing.
3. Complete the following information to identify the template file:

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

Field	Description
<b>Name</b>	<p>Enter a unique name, up to 64 characters long, which identifies the template.</p> <p>Template names and file names within the library must be unique. The name entered here can be the same as the file name, but each name and file name must be unique across all templates.</p>
<b>System Name</b>	<p>Enter a name that will uniquely identify this template.</p> <p>This name must be unique from other template system names, and can only contain letters (English alphabet), numbers, and the underscore.</p>
<b>Type</b>	<p>Select the type of template you are creating:</p> <ul style="list-style-type: none"> <li>• <b>Online Form</b> - The basis for online forms for deliverables, idea forms, and activity documents. These templates are XML files that display text and software controls in the client browsers, allowing users to work with documents without uploading or downloading files.</li> <li>• <b>Process Document</b> - The basis for creating file-based deliverables, activities, or gate documents. These templates can be any Microsoft Windows compliant file, including Smart Excel templates. All gate document templates must use this file type.</li> <li>• <b>Spreadsheet Report</b> - The basis for reports viewable in the <b>Charts &amp; Reports</b> page or on the <b>Reports</b> page within a project. These templates are spreadsheet files, including those created using the Accolade Office Extensions add-in.</li> <li>• <b>Presentation</b> - The basis for creating a portfolio presentations. These templates are Microsoft PowerPoint files.</li> <li>• <b>Project Plan</b> - The basis for creating Microsoft Project plans for projects using Accolade integration with Microsoft Project. Each model can have one or more</li> </ul>

Field	Description
	<p>documents with an Microsoft Project template in which gates, stages, deliverables, and activities are represented as tasks. These templates must have a .mpp file extension.</p> <p><b>Note:</b> Accolade's integration with Microsoft Project is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support. If you do not have access, this template type will not be an available option.</p> <ul style="list-style-type: none"> <li>• <b>Image</b> - The basis for saving images for use in places such as page layouts. To display as an image, an image file must be one of the following file types: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, .jfif, or .png. Project images that are added as related documents do not need to be stored in the Template Library.</li> <li>• <b>PDF, Email, Other</b> - Use this type for template files stored in the library for templates that may be useful throughout your organization, but are not associated to a deliverable, activity, or gate document.</li> </ul>
<b>Category</b>	<p>Enter or select the group to which this template belongs.</p> <p>Use categories to organize similar templates together. For example, create a category for deliverables and one for reports, or create categories based on document type, such as requirements and design.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the template. This description helps other users identify the template throughout the system.</p>
<b>Configuration Access Groups</b>	<p>Select the access groups to which the template belongs. Process Designers with matching permissions will be able to edit and view templates. The access groups displayed are based on the current user's access group permissions and the access groups the template belongs to.</p>

Field	Description
<b>Process Model Usage</b>	Click the <b>Process Model Usage</b> button to see the list of process models that the template is associated with. The list includes all process models the templates is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.

- If you are adding a new template or replacing an existing template, click  in the **File** field, and select the template file to upload.  
  
If you are editing an existing template, click the file icon next to the template name to download the current template version for review and edits.
- Click **Create** to add the new template or **Apply** to save changes to an existing template.

**Notes:**

- To delete a template from the Template Library, display the template in the Template Library and click **Delete**. You cannot delete a template if it is used as the idea deliverable in a model. Replace the template in the model or delete the model prior to deleting the template from the library. You cannot delete an MS Excel report template that is in use. Replace the template in all Excel reports that use it or delete the Excel reports themselves (**Process > Configuration > Charts & Reports**).
- To change the file name of a template, you must change the name of the file and then upload the file as a new template.
- Accolade's integration with Microsoft Project is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.

## Enabling Events for Microsoft Documents

**Note:** The information below assumes you have knowledge of programming in C# and .NET, and in using Microsoft Visual Studio.

Accolade can perform various actions on documents with Microsoft file extensions in response to the following events in Accolade:

- BeforeDocumentRefresh
- AfterDocumentRefresh
- BeforeDocumentSave
- AfterDocumentSave

- BeforeDocumentDownload
- AfterDocumentDownload

To specify what action is taken in response to each event, create an assembly to respond to the events and then edit the **CustomEvents.config** file to enable the assembly.

**To create the assembly:**

---

**Important!** The assembly must be created using a .NET language such as C# or VB.NET.

---

1. Create a new class library project in Visual Studio with any assembly name and namespace.
2. Create references to the following components:
  - Sopheon.Accolade.Models.Domain
  - Sopheon.Global.Utilities
  - *(Optional)* Sopheon Global Utilities Logging (if logging)
3. Create public, non-static classes with default constructors.

You can create a single class to implement any or all of the following interfaces, or create a class for each interface described below:

- **Sopheon.Sgm.Accolade.Models.Domain.Interfaces.CustomEventing.IDocumentRefresh** - Contains signatures for methods for BeforeDocumentRefresh and AfterDocumentRefresh events
- **Sopheon.Accolade.Models.Domain.Interfaces.CustomEventing.IDocumentSave** - Contains signatures for methods for BeforeDocumentSave and AfterDocumentSave events.
- **Sopheon.Accolade.Models.Domain.Interfaces.CustomEventing.IDocumentDownload** - Contains signatures for methods for BeforeDocumentDownload and AfterDocumentDownload events.

You can implement interfaces either implicitly or explicitly.

BLL classes can be instantiated from the Sopheon.Sgm.BusinessLayer namespace to retrieve additional data as needed.

Find the data types for the interfaces in the following namespaces:

Data Type	Namespace
<b>SgmID</b>	Sopheon.Global.Utilities.IDs
<b>EventDocument</b>	Sopheon.Accolade.Models.Domain.Entities.CustomEventing
<b>CustomEvent Response</b>	Sopheon.Accolade.Models.Domain.Entities.CustomEventing
<b>CustomEvent Properties</b>	Sopheon.Accolade.Models.Domain.Entities.CustomEventing

4. Compile the assembly and copy it to the following location on the application server:  
C:\Program Files\Sopheon\Accolade\Website\Bin.

**To enable the assembly:**

1. On the application server, open the **CustomEvents.config** file located in C:\Program Files\Sopheon\Accolade\Configuration.
2. Uncomment the **customEvents** element.
3. For each custom event that you want to be handled, ensure that the enabled attribute is set to **True**. Change the attribute value to **False** for events that you do not want to enable.
4. For each enabled event, enter the fully qualified class name into the event's **Type** attribute.

The fully qualified class name uses the format *<namespace.class name>*, *<assembly name>*

**Notes:**

- If you write code to save a PowerPoint presentation to the stream using **Aspose.Slides**, you must call **stream.SetLength(0)** before saving to avoid file corruption.

## Writing Macros to Respond to Save Events in the Accolade Office Extensions Add-In

You can write macros to respond to the **Before Save** and **After Save** events when saving documents from the Accolade Office Extensions add-in to Accolade.

- **Document Module** - In the Visual Basic Editor, create a document module named **SGMEvents**.
- **Events and Signatures** - In the module, create your macros using the following names and signatures.
  - **SGMBeforeSave** - This event occurs before the document is saved to Accolade.  
The method that is called by this event has the signature:  
**Public Sub SGMBeforeSave()**
  - **SGMAfterSave** - This event occurs after the document is saved to Accolade.  
The method that is called by this event has the signature:  
**Public Sub SGMAfterSave()**

## Smart Templates Overview

A "smart" template is an Excel, Word, or PowerPoint file that includes Accolade data in the document, pulled from the Accolade database each time the template (or document version) is

downloaded. Rich text metrics do not display in Excel or Word smart templates but they do display in PowerPoint.

Smart templates allow users to:

- Include the most up-to-date metric and project metadata values from the Accolade database.
- Maintain project metrics in deliverables by uploading values from the document to the database (Word files with specific-metric types only and specific Excel documents).
- Include the most up-to-date values from reference tables.

Accolade data is added to the document using Accolade field codes, which map data in the Accolade database to a place within the document, or named ranges to add Accolade online reports and other tables to Excel. Smart documents only work for documents that are uploaded into Accolade. Data does not refresh if the document is created as a link to an external document.



A document can be "smart" and not be added to Accolade as a template in the Template Library.

## Updating Metrics in Accolade From Documents (Long String Metrics)

**Note:** Accolade Office Extensions is not required to use Accolade field codes.

You can add a metric field code to Microsoft Word documents that allows both the display of a metric's current value and updates to the value. This feature is available only for metrics whose data type is **Long String** without Rich Text enabled. Word changes these updating codes into form fields when the document is refreshed.

---

**Important!** This feature does not apply to related documents.

---

The pattern for this special metric code is **{\*Metric:(system name) #Updateable\*}**. "#Updateable" is an option to the basic metric pattern that allows this code to update the metric value in Accolade. If the code contains all three of its options, its pattern would be **{\*Metric:(system name) (option) (option) (option)\*}**. The pattern does not include the parentheses.

See "[Metric Field Codes with Options](#)" on page 788 for a list of all the available options.



Example

For a Long String type metric named BusiCase:

- The code **{\*Metric:BusiCase #Updateable\*}** allows the metric to be updated.
- The code **{\*Metric:BusiCase #Updateable #MaxLen=500 #DefaultValue=Enter the business case\*}**:
  - Would allow the metric to be updated.
  - Would allow the user to enter up to 500 characters in the field.

- Would display the text "Enter the business case" if the metric was empty when the document was opened.

To allow users to enter data in the fields without deleting the codes, enter the codes in protected sections. Other text, which authors can edit normally, and other field codes, which are not editable, can be left in unprotected sections.

### To add a long string metric to a Microsoft Word document:

1. Open the document to modify.
2. Enter all of the codes and other text in the document, using section breaks to separate the updating long string metric codes from other content.
3. To protect the document, on the **Review** tab, in the Protect group, select **Restrict Editing**.
4. In the Restrict Formatting and Editing options pane, under the Editing Restrictions section, select the **Allow only this type of editing** check box and select **Filling in forms** from the list.
5. Click the **Select sections** link and clear the check boxes for all sections that *do not* contain updating metric codes, and click **OK**.
6. In the Restrict Formatting and Editing options pane, click **Yes, Start Enforcing Protection** to enable the protection features for the document.

Do not enter a password unless you want the document to be password protected.

7. Save your changes and save the document to Accolade.

#### Notes:

- Any user with access to a document can add Accolade field codes; however, only Process Designers and Administrators with the Template Access role can upload templates to the Accolade template library.
- If you type in an unprotected form field, the field and underlying code is deleted.
- Long string metrics can contain formatting to make text bold, italic, and so on. You can enter the formatting notations from within Word and have it render correctly if the metric is contained within a layout. See the main Accolade help for more information about the notations.
- Administrators and Process Designers can remove protection from the document and change content, if needed. The sections become locked again if the document is refreshed.

### Adding Images to Documents Using Accolade Field Codes

**Note:** Accolade Office Extensions is not required to use Accolade field codes.




You can add project-related images to documents, spreadsheets, and presentations using Accolade fields. Use image field codes to displays the images that are associated with the codes for each project. Accolade contains the following standard image field codes. Your company may have defined addition codes specific to your site.

- `{*image:ProjectMain*}` - Displays the image intended to represent the project in documents.
- `{*image:ProjectThumbnail*}` - Displays the project's thumbnail image.
- `{*image:ProjectProcessGraphic*}` - Displays the model graphic that shows the stages and gates in the project.

**To add an image to a document using an Accolade field code:**

1. Open the document to modify.
2. On the **Insert** tab, click **Object** in the **Text Category**.
3. In the **Create New** tab, select **Bitmap Image** and click **OK**.  
You can also insert a picture from a file rather than an Object.
4. In the document, click the space where the empty object was inserted, right-click the object outline, and select **Format Object**.
5. Display the **Alt Text** options for the object.  
This may be a tab in a dialog box, or in the Size & Properties options in a panel.
6. Enter the appropriate image field code in the **Alternative Text** box (in a document or spreadsheet), or in the **Description** field (presentation).
7. Set the height, width, and rotation for the image.

If you do not know what size the image should be, you can set an approximate size, and the document owner can set the exact size after the image has been selected in the project.

 To make the object window the same size as the image after it is inserted, open the Format Picture dialog box. On the **Size** tab, clear the **Lock aspect ratio** check box, then make sure that **Height** and **Width** (under Scale) equal 100% and that the **Relative to original picture size** check box is selected. After the distortion is removed, select the **Lock aspect ratio** check box again.

8. Save the version to Accolade and then download the new version to ensure the image displays correctly.

**Notes:**

- The images initially display in a size that completely fills the object window in the document, not in the dimensions shown in Accolade. Images may appear

distorted.

- Images do not display in project documents until images are associated with the appropriate field codes in the project.


### Adding Reference Table Values to Documents

You can create templates for deliverables, activities, gate documents, and reports that contain values or the entire table from reference tables available within Accolade. Embedding references to reference tables allows you to pull additional data into templates, while updating the values in only the reference table. The values in the template update with the current reference table value when users download the template or document version and refresh the data.

You can add reference table values using the Accolade Office Extensions add-in, or using Accolade field codes. You can also add a reference table in its entirety using a specially named worksheet within a spreadsheet file.

**Note:** Anyone in your organization can create a template that includes an embedded reference table, if they have access to the reference table itself. However, only Administrators and Process Designers with the Template Access user role can add templates to the Template Library, which is the repository for templates available within Accolade.

#### To add entire reference tables using specially named worksheets:

 To include an entire reference table, you need to know the reference table's system name as set in Accolade.

1. Open the spreadsheet and save the file to a convenient location on your computer using a file name that clearly identifies the purpose of the document.
2. Rename the worksheet containing the reference table as **SGM\_RT\_<system name>**, where <system name> is the system name of the reference table to display.

You can either hide the worksheet containing the reference table, or show it and add other content to it. Note that the reference table's top left cell starts in cell A1. If you add content outside the table's cell range, that content could be overwritten if later versions of the table are larger. Accolade fields added to the worksheet are also refreshed.

3. Save the file to Accolade or [add the file to the Template Library](#) as a **Process Document** type.

#### To add a reference table cell value using Accolade field codes:

1. Open the document and save the file to a convenient location on your computer using a file name that clearly identifies the purpose of the document.

- Where needed, add the Accolade field code that points to the reference table and column you want to include:

```
{*REFTABLE:<TableSystemName> #RowID=(row ID)
#ColumnID=<ColumnSystemName>}
```



#### Example

```
{*REFTABLE:sgm_currency #RowID=USD #ColumnID=CurrencyName*}
```

Displays the value in the USD row of the CurrencyName column of the Currency reference table.

## Adding Workflow History to Excel Templates

Create an Excel template that contains workflow history for the associated deliverable or activity. The workflow history is added as a separate worksheet in an Excel document, containing refreshed data and completion history for audit purposes.

### To add workflow history to Excel templates:

- [Create the Excel template](#) with the display worksheets for the template.
- Add a blank worksheet to the file and name it **SGM\_WF\_History**.
- Save the file and [add the template to the Template Library](#) with the type Process Document.
- Add the template to a deliverable, activity, or gate document in a process model that contains a workflow with an [auto-generate PDF step](#).

#### Notes:

- If a template used in a deliverable or activity whose workflow contains a step to auto-generate a PDF does not contain the **SGM\_WF\_History** worksheet, the PDF generates without workflow history. Workflow history is also viewable in the Deliverable details within the project.
- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Templates to Update Project Data Overview (Smart Excel)

Smart Excel templates are special template files that deliverable and activity owners can use to update project data. Rich text metrics do not display in Smart Excel templates.

Use a Smart Excel template with [Accolade field codes](#) representing Accolade data to do the following:

- Display metrics, matrices, and metadata in deliverable, activity, and gate documents.
- Update project metrics, matrices, and/or metadata when a version of a document is published to Accolade.
- Use formulas to manipulate metric values and perform data validation checks.
- Edit deliverable or activity details, such as start dates and status notes.
- Add or remove activities attached to deliverables.
- Display a project's resource plan in a deliverable or activity document and request project resources (if running the resource planning functionality in Accolade).
- Work offline and upload information to Accolade later.

### Base Templates

Each Accolade release contains a set of base templates you can use to build templates for your business.

The **Process Document - Smart Excel <version>.xltx** file is available on the [Base Templates Reference Page](#). The template contains the basic worksheet structure required to create Smart Excel templates to update project metric, matrix, and metadata values. The worksheets you use in each template depends on the project data the template updates.

- **Sheet1** - Contains the data that displays to the deliverable or activity owner and eventual readers of documents based on the template. This is the only worksheet that someone who is not building the Smart Template components interacts with. You can add more display worksheets to the template, if necessary.
- **SGM\_MetricTransfer** - Manages the display or update of metric data in a single project.
- **SGM\_Metadata** - Manages the display or update of project metadata.
- **SGM\_RelatedProjectMetrics** - Manages the display or update of metric data in projects related to the project the template is included in.
- **SGM\_DeliverablesActivities** - Manages the addition or removal of activities, or the edit of a deliverable or activity.
- **SGM\_Notes** - Contains Sopheon recommendations and suggestions for using the file to create Smart Excel templates.

The **Resource Plan Template - Basic <version>.xlsx** file, also available on the [Base Templates Reference Page](#), applies if you are running the resource planning functionality in Accolade, and contains the worksheet required for a deliverable or activity owner to create a resource plan request. A deliverable or activity owner with enough information can enter pool names, resources, and so on, for each resource request. See "[Creating Excel Templates to Request Resources](#)" on page 218.

Administrators and Process Designers use the worksheets in the template to build the display and map the Accolade data. Deliverable and activity owners interact only with the display

sheets to view and update project information and save it back to Accolade. Depending on the template design, it is possible that deliverable and activity owners can update project data using a Smart Excel template that they cannot update through the project pages within Accolade.

## Creating Excel Templates to Update Metrics in a Single Project

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update metrics within their projects. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.


Administrators and Process Designers create the templates, Process Designers add the templates to models, and team members on projects use the template to complete and update project data within Accolade.

Base Smart Excel templates on the **Process Document - Smart Excel <version>.xltx** file available on the [Base Templates Reference Page](#). See "[Templates to Update Project Data Overview \(Smart Excel\)](#)" on page 199 for more information about the template.

The procedure below describes how to add metric fields to an Excel template that display and update values when published to Accolade for a single project. A single template can also contain [project metadata](#), [matrices](#), and [metrics in related projects](#).


### To setup an Excel template that updates metrics in a single project:

**Note:** The following procedure assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
  -  Ensure that the master **Process Document - Smart Excel <version>.xltx** file is kept in a safe place, such as the template library, with no modifications to it.
2. *(Optional)* Hide the **SGM\_Metadata**, **SGM\_RelatedProjectMetrics**, **SGM\_DeliverablesActivities**, and **SGM\_Notes** worksheets, as none are required for metrics updates in a single project; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
  - Cells that only display data from Accolade. This can be metric data or project metadata from Accolade.
  - Cells that only upload metric values to Accolade.
  - Cells that display a metric value when the document is first opened, and upload any changes to the value to Accolade.

- Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that *do not* receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

 It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

4. Add a new worksheet and enter the [Accolade field codes](#) that represent the data to display within the display worksheet.

Do not leave blank rows in the list of codes.

5. (*Optional*) Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template. For example, Post-Launch Review Scorecard.
6. Create cell references between the display worksheet (originally **Sheet1**) and the worksheet added in step 4.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, create a cell reference for each cell that displays data to the appropriate cell on the worksheet that contains the field codes. Protect and lock the cells on the display worksheet that contain references to the field codes worksheet.
Cells that display a metric value when the document is first opened, and uploads any changes to the value to Accolade	For each cell in the display worksheet that displays a value when the document is first opened, and uploads any changes to the value, enter a metric field code that includes the <b>#OnceOnly</b> option. For example, <code>{*METRIC:NPV #OnceOnly*}</code> .

7. For each cell in the display worksheet that uploads a new metric value to Accolade, complete the columns in the **SGM\_MetricTransfer** worksheet.
  - **Metric System Name** - Enter the system name of each metric that is updated using the template.
  - **Metric Display Name** - Enter the display name of the metric that is updated using the template.
  - **Current Value String** - The current value if the metric is a String or Long String type.

- **Current Value Number** - The current value if the metric is a Number type.
- **Current Value Date** - The current value if the metric is a Date type.
- **Data Type** - The metric data type. Acceptable values include String, Long String, Number, List, Multi-Select List, and Date.
- **List Values** - The acceptable values if the metric is a List or Multi-Select List type.
- **Publish will use New Value column** - Enter **Y** in a metric row if the value entered for this metric in the display worksheet uploads to Accolade or enter **N** if the value is only displayed in the worksheet.
- **New Value** - Enter cell references to the cells in the display worksheet that users use to enter new metric values. Do not type anything into this column after entering the cell reference.

Do not place any intermediate formulas in the **SGM\_MetricTransfer** worksheet, do not delete the first two rows, and do not rename the worksheet.

8. Protect the display worksheet.


Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

---

**Important!** Do not protect the entire workbook. The **SGM\_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

---

9. In the display worksheet, remove the lock on the cells that users use to update metric values.
10. Hide the **SGM\_MetricTransfer** worksheet and the worksheet you added that contains the list of field codes, as these are worksheets that users interacting with the template do not need to see.

 Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

11. Save the file and [add the template to the Template Library](#).

**Notes:**

- Sopheon recommends that all **SGM\_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

### Creating Excel Templates to Update Metrics in Related Projects

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update metrics in projects related to the project the template is included in.

Updates are only made in projects to which the owner has access. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.


Administrators and Process Designers create the templates, Process Designers add the templates to models, and team members on projects use the template to complete and update related project data within Accolade.

Base Smart Excel templates on the **Process Document - Smart Excel <version>.xlsx** file available on the [Base Templates Reference Page](#). See "[Templates to Update Project Data Overview \(Smart Excel\)](#)" on page 199 for more information about the template.

The procedure below describes how to add metric fields to an Excel template that display and update values in related projects when published to Accolade. A single template can also contain [project metadata](#), [matrices](#), and [metrics in a single project](#).


### To setup an Excel template that updates metrics in related projects:

**Note:** The following procedure assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xlsx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
  -  Ensure that the master **Process Document - Smart Excel <version>.xlsx** file is kept in a safe place, such as the template library, with no modifications to it.
2. *(Optional)* Hide the **SGM\_MetricTransfer**, **SGM\_Metadata**, **SGM\_DeliverablesActivities**, and **SGM\_Notes** worksheets, as none are required for metrics updates in related projects; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
  - Cells that only display data from Accolade. This can be metric data or project metadata from Accolade.
  - Cells that only upload metric values to Accolade.
  - Cells that display a metric value when the document is first opened, and upload any changes to the value to Accolade.
  - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.



 It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

4. Add a new worksheet and enter the [Accolade field codes](#) that represent the data to display within the display worksheet.

Do not leave blank rows in the list of codes.

5. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
6. Create cell references between the display worksheet (originally **Sheet1**) and the worksheet added in step 4.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, create a cell reference for each cell that displays data to the appropriate cell on the worksheet that contains the field codes. Protect and lock the cells on the display worksheet that contain references to the field codes worksheet.
Cells that display a metric value when the document is first opened, and uploads any changes to the value to Accolade	For each cell in the display sheet that displays a value when the document is first opened, and uploads any changes to the value, enter a metric field code that includes the <b>#OnceOnly</b> option. For example, <code>{*METRIC:NPV #OnceOnly*}</code> .

7. For each cell in the display worksheet that uploads a new metric value to Accolade, complete the columns in the **SGM\_RelatedProjectMetrics** worksheet.
  - **System Project ID** - Enter the project ID of the project to update using the template. This is the project ID, not the project name. When the file that uses the template is uploaded, Accolade searches for the project IDs and determines if the projects are related to the project in which the template is used, up to five levels deep.
  - **Metric System Name** - Enter the system name of each metric that is updated using the template.
  - **Metric Display Name** - Enter the display name of the metric that is updated using the template.
  - **Current Value String** - The current value if the metric is a String or Long String type.
  - **Current Value Number** - The current value if the metric is a Number type.
  - **Current Value Date** - The current value if the metric is a Date type.

- **Data Type** - The metric data type. Acceptable values include String, Long String, Number, List, Multi-Select List, and Date.
- **List Values** - The acceptable values if the metric is a List or Multi-Select List type.
- **Publish will use New Value column** - Enter **Y** in a metric row if the value entered for this metric uploads to Accolade or enter **N** if the value is only displayed in the worksheet.
- **New Value** - Enter cell references to the cells in the display worksheet that users use to enter new metric values. Do not type anything into this column after entering the cell reference.

Do not place any intermediate formulas in the **SGM\_RelatedProjectMetrics** worksheet, do not delete the first two rows, and do not rename the worksheet.

8. Protect the display worksheet.


Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

---

**Important!** Do not protect the entire workbook. The **SGM\_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

---

9. In the display worksheet, remove the lock on the cells that users use to update metric values.
10. Hide the **SGM\_RelatedProjectMetrics** worksheet and the worksheet you added that contains the list of field codes, as these are worksheets that users interacting with the template do not need to see.

 Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

11. Save the file and [add the template to the Template Library](#).

**Notes:**

- Sopheon recommends that all **SGM\_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.

## Creating Excel Templates to Update Project Matrices

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xltx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update a project matrix. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

Administrators and Process Designers create the templates, Process Designers add the templates to models, and team members on projects use the template to complete and update project data within Accolade.

Base Smart Excel templates on the **Process Document - Smart Excel <version>.xltx** file available on the [Base Templates Reference Page](#). See "[Templates to Update Project Data Overview \(Smart Excel\)](#)" on page 199 for more information about the template.

A matrix template can contain more than one matrix, but each matrix is typically managed by the following two worksheets:

- **Display worksheet** - A worksheet within the template that template users use to enter values on and that is formatted to make data entry obvious. This is typically Sheet1 in the template. There can be more than one display worksheet.
- **Matrix worksheet** - A worksheet within the template that contains two copies of a single matrix arranged side by side. The copy on the left contains the current, downloaded metrics values. The copy on the right contains the values that the template users enter to upload to Accolade. There can be more than one matrix in the template; however, there can only be one matrix per matrix worksheet, and each matrix in the template must be unique.

The procedure below describes how to add a matrix to an Excel template that displays and updates values when published to Accolade. A single template can also contain [metrics](#), [project metadata](#), and [metrics in related projects](#).

---


**Important!** If using the calculated metric expression `CurrentMatrixValue` in a matrix and updating the matrix in Excel, you must uniquely identify other matrix rows by [flagging metrics as unique](#). If matrix columns are not unique or the Excel workbook contains duplicate columns, the Smart Excel template does not update, upload, or publish back to Accolade.

---

### To set up an Excel template to update a project matrix:

**Note:** The following procedure assumes that you have [created the matrix](#) within Accolade, added its metrics, and associated it with the appropriate models. The following procedure also assumes you are familiar with basic Excel functionality.

1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.

 Ensure that the master **Process Document - Smart Excel <version>.xltx** file is kept in a safe place, such as the template library, with no modifications to it.

2. *(Optional)* Hide the **SGM\_MetricTransfer**, **SGM\_Metadata**, **SGM\_RelatedProjectMetrics**, **SGM\_DeliverablesActivities**, and **SGM\_Notes** worksheets, as none are required for a matrix update; however, do not delete them.
3. Add a new worksheet and name it **SGM\_MX\_<matrix system name>**.


This sheet is the matrix sheet. The matrix system name must match the system name assigned to the matrix in Accolade exactly. Add additional sheets for each matrix, as necessary.

4. Save the file, [add it to the Template Library as a Process Document type](#), and [add the template to a deliverable or activity](#) in a model that has the matrices associated to it.
5. Open a test project that uses the matrices for which you created worksheets for in step 3, navigate to the deliverable or activity it is assigned to, and [download the template](#).

Downloading the template from a project populates the matrix worksheet with [two copies of the matrix](#).

6. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
  - Cells that only display downloaded data from Accolade.
  - Cells that only upload changed values to Accolade.
  - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

 It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

7. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
8. Create cell references between the display worksheet (originally **Sheet1**) and the matrix worksheet(s) created in step 3, adding references to only cells in the right copy of the matrix where values are loaded to Accolade.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells on the left side of appropriate matrix worksheet.
Cells that document owners change to upload back to Accolade	<p>On each matrix worksheet, in the "new value" cells in right side of the worksheet, enter cell references to the cells on the display worksheet where the document owner enters new values to upload back to Accolade.</p> <p>Only add cell references to cells in the right copy of the matrix where values are uploaded to Accolade. Cell references or formulas added below the cell references that make up the table in the right copy cause NULL rows or invalid data to be added to Accolade.</p>

9. Protect the display worksheet.


Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

---

**Important!** Do not protect the entire workbook. The **SGM\_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

---

10. In the display worksheet, remove the lock on the cells that users use to update metric values.
11. Hide the **SGM\_MX\_<matrix system name>** worksheet created in step 3, as this is a worksheet that users interacting with the template do not need to see.

 Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template, to default the cursor to that cell when the template is opened.

12. Save the file and [upload the new version to the template to the Template Library](#).

## Matrix Sheet Layout

When you open the template from a test project, the matrix sheet is populated with two copies of the matrix that manage the upload and download in the worksheet that matches the matrix system name. The copy on the left contains "current" values that are downloaded to the worksheet from Accolade. The copy on the right contains "new" values to update to Accolade. The metric names are prefixed with **New** in the headers in the copy on the right.

Each copy contains the following:

Column	Description
<b>Row ID</b>	The leftmost column of each matrix copy. The other columns contain the metrics. The workbook does not use the numbers in the <b>RowID</b> column to identify the rows. Rows are identified by their position below the headings in the sixth row. You can enter whatever row ID numbers or names are most useful to you to orient yourself on the sheet.
<b>Metrics</b>	<p>The metrics contained in the matrix. Each metric contains the following information.</p> <ul style="list-style-type: none"> <li>• <b>Row 1</b> - Display names of relative date metrics.</li> <li>• <b>Row 2</b> - Periods (month, quarter, or year) of relative date metrics.</li> <li>• <b>Row 3</b> - Current relative to dates of relative date metrics.</li> <li>• <b>Row 4</b> - Indicates whether a metric is set to be unique within the matrix. "Y" or "N" for all metrics. The template does not enforce the uniqueness of a metric. The indicator is only a reminder of which columns, or combinations of columns, should contain unique values.</li> <li>• <b>Row 5</b> - List items for list metrics. The cell contains all of the list values for the list metric in the column, including cascading (filtered) lists.</li> <li>• <b>Row 6</b> - The system names for each metric.</li> <li>• <b>Row 7</b> - Column headings are the display names for each metric.</li> <li>• <b>Row 8 and below</b> - Metric values from the display sheet in the left copy of the matrix. In the right copy, cell references to the display worksheet.</li> </ul>

---

**Important!** Do not edit or delete the "current" values in the copy on the left. Removing these values will cause errors with your worksheet upload.

---

**Notes:**

- Sopheon recommends that all **SGM\_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.
- The **Process Document - Smart Excel <version>.xltx** Smart Excel template contains a necessary custom document property and five worksheets that are

not used for matrices. If you use an ordinary Excel workbook rather than the Smart Excel template, you must add the custom document property **SGM\_SmartExcelVersion**, whose value is the Accolade version number.

- The **Database Reference Tables Command Timeout** system parameter governs the timeout, in seconds, for uploading each matrix from Excel to Accolade.

## Creating Excel Templates to Update Project Metadata

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xlsx** base template and Accolade field codes to create a template that allows deliverable and activity owners to update project metadata, such as gate dates and project start and end dates, within their projects. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

Administrators and Process Designers create the templates, Process Designers add the templates to models, and team members on projects use the template to complete and update project data within Accolade.

Base Smart Excel templates on the **Process Document - Smart Excel <version>.xlsx** file available on the [Base Templates Reference Page](#). See "[Templates to Update Project Data Overview \(Smart Excel\)](#)" on page 199 for more information about the template.

The procedure below describes how to add project metadata to an Excel template that displays and updates values when published to Accolade. A single template can also contain [metrics](#), [matrices](#), and [metrics in related projects](#).

### To setup an Excel template that updates metadata:

1. Open the **Process Document - Smart Excel <version>.xlsx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
  - 💡 Ensure that the master **Process Document - Smart Excel <version>.xlsx** file is kept in a safe place, such as the template library, with no modifications to it.
2. *(Optional)* Hide the **SGM\_MetricTransfer**, **SGM\_RelatedProjectsMetrics**, **SGM\_DeliverablesActivities**, and **SGM\_Notes** worksheets, as none are required for a metadata update; however, do not delete them.
3. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
  - Cells that only display downloaded data from Accolade.
  - Cells that only upload changed values to Accolade.

- Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

- 💡 It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

4. In the **SGM\_Metadata** worksheet, enter one or more of the following metadata field names into the **Name** column. These metadata names represent project metadata that users can update using the spreadsheet.
  - ActivityDeadline
  - ActivityPlannedFinishDate
  - ActivityStart
  - ActivityStatusID
  - DeliverableDeadline
  - DeliverablePlannedFinishDate
  - DeliverableStart
  - DeliverableStatusID
  - ProjectStartDate
  - ProjectEndDate
  - ProjectGateDate-(*gate number*) \*\*Enter a dash and the gate number (no spaces) after the name.
  - ProjectName
  - ProjectID \*\*This is the displayable project ID, *not* the SysProjectID
  - ProjectDescription

You can add other metadata names to the **Name** column for *display* on the display worksheet; however, only the metadata names listed above can be updated using the template. For the complete list of metadata names, see [Accolade field codes](#).

5. (*Optional*) Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
6. In the **SGM\_Metadata** worksheet, enter **Y** or **Yes** in the **Publish will use New Value** column to update the project with values in the **New Value** column when a new version of the file that uses the template is published in Accolade.
7. Create cell references between the display worksheet (originally **Sheet1**) and the **SGM\_Metadata** worksheet.



Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells in the <b>SGM_Metadata</b> worksheet.
Cells that document owners change to upload back to Accolade	On the <b>SGM_Metadata</b> worksheet, in the "new value" cells, enter cell references to the cells on the display worksheet where the document owner enters new values to upload back to Accolade.

- Protect the display worksheet.


Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

---

**Important!** Do not protect the entire workbook. The **SGM\_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

---

- In the display worksheet, remove the lock on the cells that users use to update metric values.
- Hide the **SGM\_Metadata** worksheet, as this is a worksheet that users interacting with the template do not need to see.

 Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

- Save the file and [add the template to the Template Library](#).

**Notes:**

- Sopheon recommends that all **SGM\_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.
- You can add the **SGM\_Metadata** worksheet to any version of a Smart Excel template. It is not necessary to update the template to the latest version to update the listed types of metadata. Add **columns headings** in the first row of the sheet from left to right: Name, Current Value String, Current Value Number, Current Value Date, Publish will use New Value, New Value.

## Creating Excel Templates to Update Deliverables and Activities

Create a Smart Excel template using the **Process Document - Smart Excel <version>.xlsx** base template and Accolade field codes to create a template that allows deliverable and activity owners to complete deliverable and activity information such as adding or deleting activities, and editing deliverable or activity details such as status and status notes, owners and functions, or start and deadline dates. Creating the template involves designing and laying out the display worksheets that users of the template interact with, as well as creating the appropriate mappings for any information that is pulled from Accolade.

Administrators and Process Designers create the templates, Process Designers add the templates to models, and team members on projects use the template to complete and update project data within Accolade.

Base Smart Excel templates on the **Process Document - Smart Excel <version>.xlsx** file available on the [Base Templates Reference Page](#). See "[Templates to Update Project Data Overview \(Smart Excel\)](#)" on page 199 for more information about the template.

A template that updates activities and deliverable details must contain at least the following worksheets:

- **Display worksheet** - A worksheet within the template that document owners use to enter values and that is formatted to make data entry obvious. This is typically Sheet1 in the template. There can be more than one display worksheet.
- **SGM\_DeliverablesActivities worksheet** - A worksheet within the template that contains two copies of the deliverable or activity details, arranged side by side. The copy on the left contains the current values that are downloaded when the template is downloaded from a project within Accolade. The copy on the right contains the values that are added, edited, or deleted when the deliverable or activity is uploaded and published.

Note that team members cannot update deliverables and activities that are conditioned to hide. Additionally, activities cannot be added to hidden deliverables and hidden activities cannot be deleted. Refreshed templates respect deliverable and activity conditions. See [Conditioning Deliverable and Activities Overview](#).

The following procedure provides basic information about how to setup the template. The specific document and its function dictate the formulas and other operations to populate the template. A single template can also contain project metadata and metrics. A single template can also contain [metrics](#), [project metadata](#), and [metrics in related projects](#).


---

**Important!** The template *cannot* add or delete deliverables.


---

### To setup an Excel template that modifies deliverable or activity details:

**Note:** The following procedure assumes you are familiar with basic Excel functionality.


1. Open the **Process Document - Smart Excel <version>.xltx** file and save a copy to your computer, using a file name that clearly identifies the purpose of the template.
  -  Ensure that the master **Process Document - Smart Excel <version>.xltx** file is kept in a safe place, such as the template library, with no modifications to it.
2. *(Optional)* Hide the **SGM\_MetricTransfer**, **SGM\_Metadata**, **SGM\_RelatedProjectMetrics**, and **SGM\_Notes** worksheets, as none are required for deliverable or activity updates; however, do not delete them.
3. Save the file, [add it to the Template Library as a Process Document type](#), and [add the template to a deliverable or activity](#) in a model that uses the template.
4. Open a test project that uses the model and [download the template](#) to populate for the deliverable or activity in the **SGM\_DeliverablesActivities** worksheet for the specific deliverable.
5. On **Sheet1**, create the display worksheet that users of the template interact with, identifying and noting the purpose of the cells throughout the layout.
  - Cells that only display downloaded data from Accolade.
  - Cells that only upload changed values to Accolade.
  - Cells that contain information and data that is not sent to or received from Accolade. For example, label cells.

Enter all the labels, column headings, background color, formulas, and so on, into the cells that do not receive or send data to Accolade to verify that the worksheet looks as you intend it to for users.

-  It can be useful as you are laying out the display worksheet to name the upload and download cells to more clearly identify them in the layout prior to entering the field codes to establish the data connection with Accolade.

You can add additional display worksheets, as necessary.

6. *(Optional)* Rename **Sheet1** to an appropriate, meaningful name for the display worksheet for users completing the template.
7. Create cell references between the display worksheet (originally **Sheet1**) and the **SGM\_DeliverableActivities** worksheet.

Cell Purpose on Display Worksheet	Instructions
Cells that only display downloaded data from Accolade	On the display worksheet, in the cells that display the current metric value when the document is downloaded and opened, create cell references to the corresponding "current value" cells on the left side of the <b>SGM_DeliverableActivities</b> worksheet. You can also use field codes to pull metadata and metrics into the document.
Cells that document owners change to upload back to Accolade	<p>On the <b>SGM_DeliverablesActivities</b> worksheet, in the "new value" cells on the right side of the worksheet, enter cell references to the cells on the display worksheet where the document owner enters information that determines what information is added, updated, or removed for the deliverable and activities to which this template is associated.</p> <p> See step 8 for the columns on the right side of the <b>SGM_DeliverablesActivities</b> worksheet that can <i>update</i> data.</p>

8. In the **Action** column on the right side of the **SGM\_DeliverablesActivities** worksheet, ensure that a formula or mapped cell enters one of the following values:
- **ADD** - Adds a new activity to the deliverable identified in the **Deliverable ID** column. The template can only add activities; it cannot add deliverables. If the **Action** column is set to **Add**, the ID entered in the **Activity ID** column is ignored. You do not need to enter a value for the template to add the activity.
  - **DELETE** - Deletes the activity from the deliverable. The template can only delete activities; it cannot delete deliverables. The document must be set in the process model to allow deletions of versions.
  - **UPDATE** - Updates the deliverable or activity information to match what is in the columns on the right side of the worksheet when the document based on the template is uploaded and published.

To update an existing deliverable or activity, the Deliverable ID and Activity ID must match the original ID in column A and B for the corresponding deliverable or activity. The template can update data contained in the following columns on the right side of the **SGM\_DeliverablesActivities** worksheet:

- Name
- OwnerLogin (see notes section below)
- Start

- Deadline
- Function System Name (see notes section below)
- Status ID (see notes section below)
- Status Notes

If the **Action** field is blank or contains any other value, no action is taken on the deliverable or activity identified in that row when the document is saved and published to Accolade.

9. Protect the display worksheet.

Protecting the display worksheet keeps users from overwriting cells that contain references or formulas.

---

**Important!** Do not protect the entire workbook. The **SGM\_** worksheets must remain unprotected for the download and upload between Accolade to work correctly.

---

10. In the display worksheet, remove the lock on the cells that users use to update metric values.

11. Hide the **SGM\_DeliverablesActivities** worksheet, as this is a worksheet that users interacting with the template do not need to see.

- 💡 Prior to saving, select the cell in the display worksheet where a template user typically starts typing in the template to default the cursor to that cell when the template is opened.

12. Save the file and [add the template to the Template Library](#).

**Notes:**

- Valid status IDs are as follows:
  - 1 - Completed.
  - 2 - In Progress
  - 3 - Not Started
  - 5 - Not Required
- If the **Enforce function on user selection** option is selected for a deliverable or activity within the process model the project follows, you cannot change the function using this template. The owner in the **OwnerLogin** column must be assigned the function in the **Function System Name** column when the enforce option is set.
- The Workflow in Progress status can only be set through the Accolade website or in Microsoft Project plans.

- Enter all dates in dd-mmm-yy format. Dates that do not use this format are not updated when the file is uploaded to Accolade.
- Sopheon recommends that all **SGM\_** worksheets should be hidden prior to publishing for use in a process model, to prevent users from making inadvertent changes. Do not rename these worksheets, and do not delete them from the file.


## Creating Excel Templates to Request Resources

The resource planning template in Excel can be assigned to a deliverable or activity, allowing the document owner to request project resources and manage the project's resource plan.

### To set up an Excel template to request resources:

**Note:** The following procedure assumes you are familiar with basic Excel functionality.

1. Save the **Resource Plan Template - Basic <version>.xlsx** file to your computer using a file name that clearly identifies the purpose of the template.

-  Ensure that the master **Resource Plan Template - Basic <version>.xlsx** file is kept in a safe place, such as the template library, with no modifications to it.

The file contains one worksheet, **SGM\_ResourcePlan**. You can add additional worksheets to the resource plan template; however, the **SGM\_ResourcePlan** worksheet must exist.

2. Enter one or more custom properties in the template to define the template's behavior:

Property	Description and Notes
<b>SGM_RP_AutofitColumns</b>	<p>Controls whether column widths of columns containing data are automatically set wide enough to display all of the data in the column.</p> <p><b>Type:</b> Yes or No <b>Default Value:</b> Yes</p>
<b>SGM_RP_PromptForPeriods</b>	<p>Controls whether the Refresh Project Data dialog box displays to a user downloading the document.</p> <p>The dialog box prompts the user to specify which time periods in the document are refreshed.</p>

Property	Description and Notes
	<p>If this property is set to <b>No</b>, the user cannot choose to refresh the document and you should add the <b>Date Range</b> and <b>End Period Padding</b> properties to the template to configure automatic time period refreshing.</p> <p><b>Type</b> Yes or No</p> <p><b>Default Value:</b> Yes</p>
<p><b>SGM_RP_DateRange</b></p>	<p>Controls how date ranges are refreshed.</p> <p>If this property is set to <b>Yes</b>, this determines which date range displays by default in the Refresh Project Data dialog box, otherwise this property determines which time period window displays in the refreshed document.</p> <p><b>Type:</b> Text</p> <p><b>Accepted Values:</b> COMPLETE, FUTURE, FIXED</p> <p><b>Default Value:</b> COMPLETE</p> <ul style="list-style-type: none"> <li>• <b>Complete</b> is from the first day to the last day of the projects current resource plan. The last period can be modified.</li> <li>• <b>Future</b> is from the current time period to the last day of the project's resource plan. The last period can be modified.</li> <li>• <b>Fixed</b> is from the first day to the last day of the project's current resource plan. The first and last periods can be modified.</li> </ul>
<p><b>SGM_RP_EndPeriodPadding</b></p>	<p>Specifies how many time periods are automatically added to the end of the default time period window.</p> <p>This property is ignored if <b>SGM_RP_PromptForPeriods</b> is set to <b>Yes</b>.</p> <p><b>Type:</b> numbers</p> <p><b>Default value:</b> 0</p>
<p><b>SGM_RP_Stages</b></p>	<p>Identifies the project stages for which resource data is imported or exported.</p> <p>If the property is not defined, all resource plan data is retrieved.</p> <p><b>Type:</b> Text</p>

Property	Description and Notes
	<p><b>Accepted Values:</b> The possible values include a comma separated string of the following:</p> <ul style="list-style-type: none"> <li>• <b>The string "[Project]"</b> - Retrieves the resource plan for the project as a whole.</li> <li>• <b>Whole numbers</b> - Retrieve the resource plan for each stage whose absolute number is listed. For example, the number 3 retrieves the plan for the third stage in the project.</li> <li>• <b>Positive or negative numbers</b> - Number such as +1 or -2 retrieve the resource plan for each stage whose relative relationship with the deliverable's stage is specified. For example, "+1" would specify the stage following the deliverable's stage.</li> </ul>
<b>SGM_RP_StartCell</b>	<p>Controls where on the spreadsheet the data is displayed.</p> <p>The value specifies the top, leftmost spreadsheet cell in which resource data displays. The data includes the header row.</p> <p><b>Type:</b> Text</p> <p><b>Accepted Values:</b> The value must specify the valid address of a single cell in Excel.</p> <p><b>Default value:</b> A1</p>
<b>SGM_RP_GetRequestedResourcesOnly</b>	<p>Controls whether assigned demands are excluded from the document on refresh, and ignored on demand update as a result of document publish.</p> <p>If the property is not defined, both assigned and requested resources are included and updated on document publish.</p> <p><b>Type:</b> Yes or No</p> <p><b>Default Value:</b> No</p>

For information about adding custom properties to an Excel document, see the Excel online Help.

3. Save the file and [add the template to the Template Library](#).
4. [Add the plan to a deliverable or activity](#) within a model.




## Adding Reference Table Values to Documents

You can create templates for deliverables, activities, gate documents, and reports that contain values or the entire table from reference tables available within Accolade. Embedding references to reference tables allows you to pull additional data into templates, while updating the values in only the reference table. The values in the template update with the current reference table value when users download the template or document version and refresh the data.

You can add reference table values using the Accolade Office Extensions add-in, or using Accolade field codes. You can also add a reference table in its entirety using a specially named worksheet within a spreadsheet file.

**Note:** Anyone in your organization can create a template that includes an embedded reference table, if they have access to the reference table itself. However, only Administrators and Process Designers with the Template Access user role can add templates to the Template Library, which is the repository for templates available within Accolade.

### To add entire reference tables using specially named worksheets:

 To include an entire reference table, you need to know the reference table's system name as set in Accolade.

1. Open the spreadsheet and save the file to a convenient location on your computer using a file name that clearly identifies the purpose of the document.
2. Rename the worksheet containing the reference table as **SGM\_RT\_<system name>**, where <system name> is the system name of the reference table to display.

You can either hide the worksheet containing the reference table, or show it and add other content to it. Note that the reference table's top left cell starts in cell A1. If you add content outside the table's cell range, that content could be overwritten if later versions of the table are larger. Accolade fields added to the worksheet are also refreshed.

3. Save the file to Accolade or [add the file to the Template Library](#) as a **Process Document** type.

### To add a reference table cell value using Accolade field codes:

1. Open the document and save the file to a convenient location on your computer using a file name that clearly identifies the purpose of the document.
2. Where needed, add the Accolade field code that points to the reference table and column you want to include:

```
{*REFTABLE:<TableSystemName> #RowID=(row ID)
#ColumnID=<ColumnSystemName>}
```

 Example

```
{*REFTABLE:sgm_currency #RowID=USD #ColumnID=CurrencyName*}
```

Displays the value in the USD row of the CurrencyName column of the Currency reference table.

## Creating Microsoft Project Plans as Templates


Insert a process model into a blank Microsoft Project plan to create the initial version of an Microsoft Project template. You can modify the project plan to reflect only a part of the model, such as a single stage, and use multiple project plans across a project.

Attaching the Microsoft Project plan to the process model allows the template to be available in each project that uses this model, allowing the document owner to create an Microsoft Project plan for the project, or portion of a project as reflected in the plan.

A model can contain as many deliverables or activities with Microsoft Project plans as needed.

### To create an Microsoft Project plan as a template:

**Note:** The following procedure assumes you are familiar with basic Microsoft Project functionality, and that a process model exists, including all its stages, gates, deliverables, and activities.

1. Open a new file in Microsoft Project.
2. In the Microsoft Project ribbon, navigate to the Accolade menu and select  **Insert Model**.
3. In the **Accolade Server URL** field, select or enter the path to the Accolade server and click **Go** to connect to the server.


A list of active models displays in the **Select Model** list. To include inactive models in the list, select the **Show inactive models** option.

To search for a model by model name, enter the name in the **Search for Model** field and click **Search**.

4. Select the model to add to the project plan and click **OK**.

All the stages, gates, deliverables, activities, and gate documents are added to the project plan.

5. Modify the project plan, as necessary.

 To tailor a template to reflect only part of the model, delete the stage and gate summary tasks and any subtask that you do not want to include. If you delete the summary task for a stage, the subtask deliverables and activities will not be recreated when the plan is refreshed. However, if you delete deliverables and activities, and the stage summary task remains in the plan, the deleted subtasks are recreated when the plan is refreshed.

For information about working on the template in Microsoft Project, refer to the online help in the Accolade menu in Microsoft Project or to Microsoft Project's own online Help.

6. Save the file and [add the project plan to the Template Library](#) as a **Project Plan** template.
7. In the model, [select the Microsoft Project plan from the Template Library](#) as the template for the appropriate deliverable or activity.

When you select the template, only the Microsoft Project plans uploaded to the Template Library that contain the model you are working in display for selection.

8. Save the changes to the model.

**Notes:**

- When a model that contains Microsoft Project templates is deleted, the template is also deleted from the library.
- The Accolade menu in the add-in uses the custom name defined for Accolade. See ["Replacing Accolade Terminology" on page 391](#) for more information on customizing terminology displayed in the application.

## Portfolio Snapshots Overview

Portfolio snapshots are saved records of project data at a specific point in time, creating a history of metric and resource changes across projects.

A portfolio snapshot includes the following information:

- Project metadata, such as dates, descriptions, and names.
- Resource data.
- Matrix data
- Select metric data.

Metrics and matrices are the only type of snapshot data that is selected for inclusion or exclusion from snapshots. All other content is included in each snapshot.

When you have a sufficient history of project metric values, reports can be created to show how metric values and resources have changed over time.

## Snapshot Database

Snapshots are saved in a separate database, usually named `Accolade_Snapshots`. Snapshots create multiple records of each selected metric; therefore the snapshots database may need to be larger than what would be needed to store only the current metric values, and the rate at which the database is filled will increase as well. Saving the snapshots in a separate database helps to minimize the effect of saving and accessing this data on Accolade. It is important to ensure that the snapshots database has enough storage capacity to handle the needed data and to ensure that the number of saved snapshots, and the number of metrics included in each snapshot, does not overwhelm the available space.

## Selecting Metrics and Matrices to Include in Portfolio Snapshots

Each metric or matrix that is available to reporting can be selected for inclusion or exclusion in a snapshot. All other content is included with no need to select the content.

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**Important!** Every metric and matrix included in snapshots is saved to the snapshots database each time a snapshot is taken. Select only the items that are required for portfolio history purposes.

---

Process Designers select the metrics and matrices that are included in portfolio snapshots.

**To select a metric for inclusion in a snapshot:**

1. From the **System** menu, select **Content Sources > Metrics**.
2. Click the name of the metric to edit.
3. Ensure the **Available to Reporting** option is selected.
4. From the **System** menu, select **Content Sources > Portfolio Snapshots**.
5. Click **Configure Snapshots** and select **Metrics**.
6. In **Select Metric(s)**, select the metrics in the left list that you want to include in snapshots and move them to the **Selected** list on the right.  
Select a category to refine the list of displayed metrics.
7. Click **Done** to save your changes.

**To select a matrix for inclusion in a snapshot:**

1. From the **System** menu, select **Content Sources > Matrices**.
2. Click the name of the matrix to edit.
3. Ensure the **Available to Reporting** option is selected.
4. From the **System** menu, select **Content Sources > Portfolio Snapshots**.
5. Click **Configure Snapshots** and select **Matrices**.
6. In **Select Matrice(s)**, select the matrices in the left list that you want to include in snapshots and move them to the **Selected** list on the right.  
Select a category to refine the list of displayed matrices.
7. Click **Done** to save your changes.

**Notes:**

- Rich text metrics cannot be added to snapshots. If a matrix containing a rich text metric is added to a snapshot, the rich text metric is automatically excluded from the matrix's snapshot data.
- Metric and matrix data is removed from saved snapshots if the metric or matrix is deleted, made unavailable to reporting, or removed as a selected option in the

snapshot configuration. If a project is deleted, the project and all its data are removed from saved snapshots.

- Adding metrics and matrices adds the values to all future snapshots. Existing snapshots contain a placeholder for the metric or matrix with no value.

## Creating Scheduled Snapshots

Use the Task Scheduler on the Accolade server to create a scheduled, timed snapshot.

To create scheduled snapshots you must have the following permissions and rights on the Accolade and snapshots servers:

- Administrators with administrator rights to the Accolade server.
- A user account with SGM\_Write or db\_owner role on the Accolade and snapshots databases.

The procedure below assumes that you are familiar with server and database management.

### To start a snapshot series:


**Note:** You cannot start a series while another series is running.

1. On the Accolade server, in **Administrative Tools**, open **Task Scheduler** and create a new task.  
The Create Task dialog box displays.
2. On the **General** tab, name the task, enter a description, and select the security options.  
You can select an option to run the series whether the user account you select is logged on or not.
3. On the **Triggers** tab, click **New** and select the frequency and time that the snapshots for this series are taken.
4. In the list next to the **Days** option, select the last day of the month to create monthly and quarterly snapshots.  
Set the task to start during off hours when Accolade is not heavily used.
5. On the **Actions** tab, click **New**, leave **Start a program** selected in the **Action** list, and select **TakeSnapshot.exe** in the following default location:  
C:\Program Files\Sopheon\Accolade\Bin\TakeSnapshot.exe.  
The user running Task Scheduler must have administrative rights on the application server to use TakeSnapshot.exe.
6. In the **Add arguments** field, enter the snapshot series' name.  
Add optional arguments to display the series type and description within Accolade.  
Enter the name and arguments in the following format: (snapshot name) /type:"(type name)" /desc:"(description)" [without parentheses].

For example: Evening Snapshot /type:"Daily" /desc:"Records final data for the day."

7. Configure the task further on the **Conditions** tab and the **Settings** tabs, as necessary.
8. Click **OK** to save the task.

**Notes:**

- To stop a scheduled snapshot, double-click the task in the Task Scheduler and click **Delete**. To stop a series temporarily, create conditions that cannot be met.
- To remove individual snapshots taken in the series, display the snapshots in Accolade (**Process > Portfolio Snapshots**), select the check box in the  column and click **Delete**.

## Taking Individual Portfolio Snapshots

Administrators and Process Managers can take an individual portfolio snapshot to save a record of portfolio data at a specific point in time.

To ensure that the server that stores the snapshot data maintains enough space, review the snapshots currently saved and delete any, as necessary.


**To take an individual portfolio snapshot:**

1. From the **System** menu, select **Content Sources > Portfolio Snapshots**.
2. Click **Take Snapshot** and enter the following information to identify the snapshot:

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the snapshot. For example, Q2 2015 Portfolio Summary.
<b>Type</b>	Enter or select the type of snapshot. The type is a label to identify a group of snapshots for reporting purposes.  <b>Important!</b> The <b>SYS_Current</b> type is considered a reoccurring snapshot of the current set of portfolio data at any given time. Snapshots of this selected type are overwritten and not saved, as there can only be one snapshot using the <b>SYS_Current</b> type.
<b>Description</b>	Enter a description of the purpose or nature of snapshot. This description helps other users identify the snapshot.

3. Click **OK** to start the snapshot.

**Notes:**

- To delete snapshots, select the check box in the  column of the snapshots to delete and click **Delete**.
- Deleting one snapshot of a series has no effect on any other snapshot in a series or on the series itself.
- Only one snapshot can be taken and saved at a time. To cancel a snapshot that is in process, click **Cancel Snapshot** after the snapshot starts.
- The **SYS\_Current** snapshot type cannot be renamed as it has dependencies that use that name. These may include custom events scheduled to take snapshots and reporting.





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## Chapter 3

# Defining Process Flow Components

The goal when defining process flows and the components that make up those flows is to create a repeatable, dependable process for company's needs. The components discussed in this chapter, along with those in the previous chapter, are the building blocks for created a repeatable product or service development process.

- [Classes](#)
- [Workflows](#)
- [Reference Tables](#)

Process Designers use the components described here and in the previous chapter when defining process models, the starting point for projects in Accolade. For more information about building process models and how each component fits into a model, see the Accolade online Help.

## Classes to Group Process Models Overview

Classes help ensure that a group of process models have consistent characteristics and categorize a selection of process models that share a similar process type. The class designation allows Process Designers to create groups of models that share similar visibility on Accolade pages, similar event reporting, and other similarities.

Classes set some features of projects based on process models that use the class, such as whether the project is available on the All My Work page. Each project's basic framework at creation is a combination of the class characteristics and the process model that uses the class.

The primary difference between classes is the process model type:

- **Gated** - A model that follows the Phase Gate process, including one or more sets of stages and gates.
- **Non-Gated** - A model that includes one stage but no gates. Non-gated models are useful as static place-holders and information storage locations in larger systems.
- **Idea** - A model used for idea submissions. Idea models, like Gated models, can contain one or more sets of stages and gates.

The accessibility of models can be affected by the access groups of the class it was created from in the following ways:

- If a user does not have view access to a class, they do not have view access for models created from that class.
- Models cannot be copied in UI if the class is read only for the user.
- In the model editor page, only classes that the user has edit access and have equal or higher access groups to the model will be displayed.



### Classes Best Practices

Keep the following set of best practice recommendations in mind when creating classes:

- **Copy Existing Classes to Create New Classes** - If you have a class with a large number of reasons for events, and you need to create a class that is similar, copy a class and modify its reason lists rather than creating new reasons manually.
- **Use the Same Reason Codes for Event Reasons Across Classes** - For reporting purposes, define a set of reasons for events that may occur in projects that use models based on each class, and ensure reasons for similar events are the same across classes. For example, ensure the event reason code for the gate decision to kill a project is the same for all classes. If the reason codes are different across classes, you also need to create separate gate decision reports for each class.

- **Create Unique Event Reason Codes without Reusing Deleted Codes** - If you delete a reason that has *not* been selected in a project, the reason is deleted, and you can reuse its code. However, if you delete a reason that *has been* associated with an event in a project, the code is removed as an option from future projects, but remains assigned to events in existing projects for reporting purposes. If you re-use the deleted code, Accolade associates events previously linked to the deleted reason code with the new reason code. For this reason, Sopheon recommends using only unique codes and to avoid re-using deleted codes.
- **Manage Classes for Accolade Innovation Planning Projects Appropriately** - Accolade creates classes and associated models for planning projects as Planners create element types for planning and roadmapping. Changes to the class, such as changing the name or deleting the class, are reflected in the element type. Ensure that users with the Planner user role that are allowed to create element types and Process Designers within your organization understand that the changes to a class also change the element type.

### Modifying Existing Classes

Consider how modifying an existing class changes projects and models based on that class.


Changes made to the following class details are reflected in models using the class and in current and future projects that use those models. All class changes apply to projects created after the class changes are saved.


- Display name
- System name
- Description
- Email notifications
- Project included on All My Work page
- Assignments included on All My Work page
- Include in Save to Accolade from Microsoft 365 applications.
- Changing Gate Line-up setting or the Reporting setting a default selection to an 'always' selection. Note that changing these settings enables the field in open projects, but the setting is not automatically changed.
- Changing the Reporting flag from a default selection to an 'always' selection
- Class icon selection
- Class-specific terminology changes
- Adding, deleting, or modifying event reason lists change the lists in current and future projects.

## Creating Classes

A class categorizes a selection of process models that share a similar process type, and serves as a template for the models and projects created that are based on them.


### To create a class:

- From the **System** menu, select **Process > Classes**.  
To narrow the class list, search by the class name, system name, or category.
- Do one of the following:
  - **To add a new class** - Click **Add New** in the upper right corner of the page.
  - **To create a class based on an existing class** - Click  in the **Copy** column to create a copy that can be used as a base to build a new class.
  - **To edit an existing class** - Click the name of the class to open it for editing.

 To copy a class to use as a base for a new class you must have "Can Edit" for any access group in the system and "Can View" for at least one access group on the class. If you "Can Edit" any of the access groups the class belongs to, the copy will have those groups. If you do not have "Can Edit" on any of the class' access groups, the copy will inherit your highest access group you can edit.
- Complete the following information to identify and describe the class:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the class.
<b>System Name</b>	Enter a unique, shorter name that identifies the class in queries, reporting views, field codes, and other places in Accolade. The name must be unique among classes and can contain only letters (English alphabet), numbers, and the underscore.
<b>Process Type</b>	Select the type of process that models created using this class follow: <ul style="list-style-type: none"> <li>• <b>Gated</b> - A model that follows the Phase Gate process, including one or more sets of stages and gates.</li> <li>• <b>Non-Gated</b> - A model that includes one stage but no gates. Non-gated models are useful as static placeholders and information storage locations in larger systems.</li> <li>• <b>Idea</b> - The model used for idea submissions. Idea models, like gated models, can contain one or more sets of stages and gates.</li> </ul>

Field	Description
	<p> The <b>Idea</b> option is only available if your company uses the optional Idea Submission or Ideation components.</p> <p>Note that this selection cannot be changed once the class is created.</p>
<b>Icon</b>	<p>Select the icon that projects based on this class use.</p> <p>Icons help provide a visual indication of the class type where projects are listed, including the All My Work and other similar pages.</p>
<b>Description</b>	<p>Enter a description of the purpose or nature of the class. This description helps others identify the class throughout the system.</p>
<b>Order</b>	<p>Enter a number to specify the class's place when it displays in a list of classes.</p> <p>Lower numbered classes display higher in the list.</p>

4. Complete the additional class options as appropriate for the class you are defining.


Field	Description
<b>Gate Line-Up</b>	<p>Select whether the projects based on this class display in the <b>Gate-Lineup</b> pages:</p> <ul style="list-style-type: none"> <li>• <b>Default to included</b> - The <b>Excluded from Line-up</b> check box within the project is initially set to include the project in the line-up pages. Process Managers and Project Managers can change the value within projects, as necessary.</li> <li>• <b>Default to excluded</b> - The <b>Excluded from Line-up</b> check box within the project is initially set to exclude the project from the line-up pages. Process Managers and Project Managers can change the value within projects, as necessary.</li> <li>• <b>Always included</b> - The <b>Excluded from Line-up</b> check box is set to include the project in the line-up pages and is view only within the project.</li> <li>• <b>Always excluded</b> - The <b>Excluded from Line-up</b> check box is set to exclude the project from the line-up pages and is view only within the project.</li> </ul>
<b>Reporting</b>	<p>Select whether data from projects based on this class is included in reports:</p>





Field	Description
	<ul style="list-style-type: none"> <li>• <b>Default to included</b> - The <b>Excluded from Reports</b> check box within the project is initially set to include the project data in reports. Process Managers and Project Managers can change the value within projects, if necessary.</li> <li>• <b>Default to excluded</b> - The <b>Excluded from Reports</b> check box is initially set to exclude the project data from reports. Process Managers and Project Managers can change the value within products, if necessary.</li> <li>• <b>Always included</b> - The <b>Excluded from Reports</b> check box is set to include the project data in reports and is view only within the project.</li> <li>• <b>Always excluded</b> - The <b>Excluded from Reports</b> check box is set to exclude the project data from reports and is view-only within the project.</li> </ul>

5. Select the **Active** check box when the class is ready to use in process models.
6. Select the **Is portfolio** check box to allow projects that use this model to be a parent project in a collection of projects, called a portfolio.

Selecting this option displays the **Portfolio** page within projects, which lists projects that are linked using the Member Of link type. See ["Creating Project Link Types" on page 401](#) for more information on using project links.

7. Select the **Enable email notifications** check box to send notifications by default via email about events in projects that use models that are based in this class.
8. Select one or more of the "Include in" options to make projects based on models that use this class available throughout Accolade.

Field	Description
<b>Include in Work Pod</b>	Select this check box to allow projects as well as deliverables and activities to display in the Work pod.
<b>Include In Portfolio Optimizer</b>	<p>Select this check box to include projects in Accolade Portfolio Optimizer.</p> <p>Typically, projects that do not include resources, for example projects that are only grouping mechanisms for other projects, are excluded from Portfolio Optimizer.</p> <p> This selection is only available if your company uses the optional Portfolio Optimizer component.</p>
<b>Include In Resource</b>	Select this check box to include projects in Resource Editor.

Field	Description
<b>Editor</b>	<p>Typically, projects that do not include resources, for example projects that are only grouping mechanisms for other projects, are excluded from Resource Editor.</p> <p> This selection is only available if your company uses the optional Resource Planning component.</p>
<b>Include in Save to Accolade</b>	<p>Select this check box if you want users to be able to use <b>Save to Accolade</b> functionality to save documents and project plans to projects that use models that are based in this class.</p>
<b>Include in Time Tracking</b>	<p>Clear this check box if projects created using this class do not require time to be tracked against them.</p> <p>Leave the check box selected if timesheet users can add projects created in this class to their timesheets to record time worked on that project.</p> <p> This selection is only available if your company uses the optional Time Tracking component.</p>
<b>Show in Planning</b>	<p>Select this check box to display projects created using this class as planning elements in planning and roadmapping.</p> <p>This option only controls the display of projects as elements and is available to all class types in Innovation Planning. See <a href="#">"Creating Classes for Planning Element Types" on page 236</a> for more information.</p> <p> This selection is only available if your company uses the optional Innovation Planning and/or Roadmapping components.</p>
<b>Create in Planning</b>	<p>Select this check box and select a process model associated with this class to make the class available as a planning element type.</p> <p>The <b>Include in Planning</b> option is selected by default when you select this option, so elements created using this type in Innovation Planning are also available to view within Innovation Planning.</p> <p>Note that this option is not available until after a gated or non-gated class is created and at least one model is associated to the class.</p> <p> This selection is only available if your company uses the optional Innovation Planning and/or Roadmapping components.</p>

9. Click **Create** to create the new class or **Apply** to save changes to an existing class.
10. *(Optional)* After you create the class, continue with one or more of the following steps to complete the class setup:
  - [Define reason codes](#) for project events to log why certain events in these projects occurred.
  - Configure [access group restrictions](#) for the class.
  - Set [customized terminology](#) to be applied to projects that use a model based in this class.

**Notes:**

- To delete a class, display the class and ensure the **Active** check box is cleared. Click **Delete**. If you delete a class that is used by one or more security profiles, users with those profiles no longer have access rights to projects that use models assigned to that class.
- Newly created classes are automatically added to the classes available in the Child Relationship link type if all classes are set as available for that link type. However, if other link types include all classes, a newly created class is not automatically added. Update the link type to include the class, as needed.
- If you delete a class used in Accolade Innovation Planning and Roadmapping, any planning element type based on that class is also deleted and planning elements that use that type are removed from the planning board and all planning views. However, models and projects based on that class are not deleted.
- Resource Planning, Time Tracking, Portfolio Optimizer, Innovation Planning and Roadmapping are optional Accolade components that you may not have access to. To implement these solutions, contact [Sopheon Customer Support](#).

## Creating Classes for Planning Element Types

Classes can also correspond to planning element types in Accolade Innovation Planning. When you create a planning class and its associated model with the appropriate options set, a planning element type with the class name is added to Innovation Planning. The projects that correspond to planning elements using the element type follow the model that is associated with the class. If Accolade Innovation Planning is enabled, a default class and model (both named **[Innovation Planning Default]**) are included in Accolade, but you can create custom classes for the projects that correspond to planning elements.

Only Gated and Non-gated classes can be element types in Innovation Planning. You can set Idea classes to show projects associated with the class in Innovation Planning; however, you cannot set an Idea class to be used as a planning element type to create planning elements within Innovation Planning.



**To create a class that becomes a planning element type:**

1. [Create a class](#).
2. [Create the model](#) based on this class, selecting the class in the model.  
The model must have at least one stage or gate defined within it. It cannot be an empty placeholder model.
3. Re-open the class.
4. In the Planning section, select the **Create** check box.  
The **Create** check box is not visible until after the class is created.  
The **Show** option is selected by default when you select this option so elements created using this type are also available to view within Innovation Planning.
5. In the **Create** drop-down list, select the process model created in step 2 to associate it with the class.
6. Click **Apply** to save your changes.

**Notes:**

- The class with the default name of **[Innovation Planning Default]** is the default class for projects created when planning elements are added to the planning board. You cannot delete this class; however, you can rename it and update some of its details.
- Innovation Planning and Roadmapping are optional Accolade components that you may not have access to. To implement these solutions, contact [Sopheon Customer Support](#).

**Defining Event Reason Codes in Classes**

Reason codes allow detailed history of certain project events, such as changing a project manager on a project or changing a gate date. For reporting purposes, define a set of reasons for events that may occur in projects that use models based on each class, and ensure reasons for similar events are the same across classes. For example, ensure the event reason code for the gate decision to cancel a project is the same for all classes. If the reason codes are different across classes, you also need to create separate gate decision reports for each class.

**Note:** Event reason codes are not used for automated gate decisions set for [gates in the process model](#) or through an [automated workflow step](#).

**To define an event reason code in a class:**


1. From the **System** menu, select **Process > Classes**. To narrow the class list, search by the class name, system name, or category.

2. Either select the class to edit.
3. Click the **Event Reason List** tab and select a project event type from the **Event Type** field.
4. If necessary, click **Add New** to display a new line for the event code and complete the following information:

Field	Description
<b>Order</b>	Enter a number to specify the reason's place when it displays in a list of reasons. Lower numbered reasons display higher in the list.
<b>Code</b>	Enter a unique, shorter name that identifies the reason in queries, reporting views, and in Accolade Office Extensions. Codes help to maintain project history if changes are made to the reason name.
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the reason to users who assign it to events within projects.

5. Select the **Active** check box when the reason code is ready to use in projects.
6. Click **Apply** to save your changes.

**Notes:**

- To delete a reason code, click the  at the end of the reason code's row, and click **Apply** to save your change.

## Workflows to Complete Documents Overview

Collaborative workflows, provided as an optional Accolade feature, provide a means to define the sequence of steps and actions needed to create a complex deliverable or activity. Workflows are useful for deliverables and activities that need to be coordinated in a specific sequence. Workflows are primarily intended for the creation and review of documents, but they can be used to manage the creation of other things as well, such as prototypes.

Administrators and Process Designers create workflows and add them to the Template Library and to models, as necessary. Workflows added to the Template Library are available to add to a deliverable or activity at the process model level and at the project level. Workflows added to a model are required before a deliverable or activity's status can be set to **Completed**. Workflows added at the project level are considered optional and do not require completion prior the deliverable or activity's status being set to **Completed**.

### Workflow Steps and Actions

Each step in a workflow is a single part of producing a document, such as creating a draft or having a portion of a document reviewed. Each step contains one or more actions needed to

complete the step, or is an automated action that is run after the previous step completes. Each manual action has an owner who performs the action and a specified number of days that the action is scheduled to take. When a project is started, the document owner, Project Manager, or Process Manager starts the workflow. The owners of an action within a workflow are assigned permissions that determine if they can edit, publish, or approve deliverables or activities associated with the workflow.

Action owners can either approve a step, which moves the workflow to the action, or reject a step and move it back to a previous action in the workflow.

After all the steps in a workflow are approved, the deliverable or activity status is set to **Completed**.

## Workflow Best Practices

Keep the following set of best practice recommendations in mind when designing and building workflows:

- **Communicate Workflow Changes to Project Teams** - If changes are required to a workflow that is saved in the Template Library, communicate those changes to the project teams. Changes made to a workflow are not reflected in workflows that are in process within a project. The workflow must be stopped for the changes to take effect.
- **Project Level Changes Sometimes Take Precedence** - Changes to the numbers of days for an action completion and the owner assigned to an action within a step are not overridden at the project level if changes have been made there.
- **Use Workflows for Document Review Cycles** - Workflows are an excellent method to track a document through a review cycle. For example, if the document needs to go through a series of peer reviews prior to the senior manager on a project reviewing it.
- **Create Smart Workflows** - Smart workflows contain separate sets of metric conditions that determine the following for the workflow:
  - If the actions within a workflow step are included or excluded with the project. See ["Adding Conditions That Determine Workflow Actions Availability" on page 246](#).
  - When a workflow can start. See ["Creating Workflows" on page 239](#).
  - If a project is migrated to one or more other models after the workflow is completed. See ["Migrating Projects After Workflow Completion" on page 250](#).
- **Create Master Workflows** - Using Smart workflows that contain rules that determine whether workflow actions are included in the workflow, you can create one or more master workflows for use across multiple projects.
- **Automate Your Workflows** - Use automated steps within your workflow configurations to save your project teams time and manual entry, and to ensure artifacts are recorded and saved for audit purposes.

## Creating Workflows



Administrators and Process Designers can create workflows to design how several people can cooperate to create and review a deliverable or activity. Steps and actions within steps can be added to the workflow for each primary part of the workflow process.

**To create a workflow:**

1. From the **System** menu, select **Process > Workflows**.  
To narrow the workflow list, search by the workflow name or system name.
2. Do one of the following:
  - **To add a new workflow** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing workflow** - Click the name of the workflow to open it for editing.  
Edits made to an existing workflow are applied to the workflow in a project if the workflow has not started, or when a workflow in progress is stopped.
3. Complete the following information to identify and describe the workflow:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the workflow.
<b>System Name</b>	Enter a unique, shorter name that identifies the workflow in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among workflows and can contain only letters (English alphabet), numbers, and the underscore.
<b>Description</b>	Enter a description of the purpose or nature of the workflow.  This description helps other users identify the workflow throughout the system.
<b>Category</b>	Enter or select the group to which this workflow belongs.  Use categories to organize like workflows together. For example, you may choose to group all the workflows used for financial approvals, in order to separate them from workflows that are used for different purposes. <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>

Field	Description
<b>Active</b>	Select the check box when the workflow is ready to use in projects.
<b>Users cannot own multiple actions</b>	<p>Select the check box to ensure that a single user cannot be manually assigned to multiple actions in a workflow.</p> <p>If a user is assigned to an action, their name is not available for selection as an owner for other actions within the workflow.</p> <p><b>Note:</b> Existing repeated workflow action assignments are not affected if you select this setting after a workflow is created. Assignments for workflow actions on the Team page of a project supersede this setting.</p>
<b>Start Conditions</b>	<p>Click to add metric conditions that determine when a workflow can start.</p> <p>Using start conditions helps to ensure that an approval flow does not start before the defined conditions within a project are met. The <b>Start Workflow</b> option within the project is disabled until the project's metric settings meet the defined conditions.</p> <p>Click , select a metric to include as a condition, and click <b>Select</b>. Use the <b>Category</b> and <b>Search</b> options to refine the list of metrics.</p> <p>For the added metric, select or enter the value the metric must meet within the project before the workflow can start. Add additional metrics, as necessary.</p>
<b>Migration Map Rules</b>	Click  to add metric conditions that determine if a project migration occurs using the selected map when the workflow is completed.

4. Click **Create** to create the new workflow or **Apply** to save changes to an existing workflow.
5. On the **Steps** tab, add [manual or automated steps](#) to the workflow process, for example, to create PDFs or to [set gate dates](#) automatically.

You can also [add conditions to determine workflow actions availability](#) or [set up automatic project migration](#) after a workflow is completed.

6. *(Optional)* On the **Security** tab, follow the instructions listed in "[Restricting Configuration for Workflows](#)" on page 39 to configure access group restrictions.

7. *(Optional)* On the **Security** tab, click **Process Model Usage** to see the list of process models that the workflow is associated with. The list includes all process models the workflow is included in, as well as links to the [process model's component tree](#) pages you have Edit access to.

**Notes:**

- See the Adding Steps to Workflows topic in the online Help for information about adding conditions to actions within workflow steps for Smart workflows.
- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Adding Steps to Workflows

Workflows consist of a series of steps that mark each primary part of the workflow process. For example, a step can represent a single person's review and approval within a chain of reviews that must happen in order (peer review, team leader approval, and department or higher level approval). Each step contains one or more actions that indicate something that an action owners needs to complete to accomplish the step. Each action includes an owner and a time frame, and can contain other details.

Add multiple actions to a step to enable several people to work on the deliverable at the same time.



Workflow actions can also include conditions that determine if they are included within the workflow in a project based on metric values with the project.




### To add manual steps to a workflow:

1. After [creating the workflow](#), click the **Steps** tab, click **Add Step** in the lower right corner of the page, and complete the following information to identify the manual step:

Field	Description
<b>Step Name</b>	Enter a name that identifies the workflow step. This name displays to users in the project.
<b>Step System Name</b>	Enter a unique, internal name the system uses to identify the workflow step. The system name must be unique across all workflows.
<b>Proceed after 1 Decision</b>	Select this check box if the first approval or "reject but continue" decision in a multi-action step moves the workflow forward to the next step without waiting for other reviews.

Field	Description
	<p>If this check box is not selected, the workflow does not move to the next step until all reviewers in a multi-action step have responded.</p> <p>The first decision to reject and send the workflow back sends the workflow back to the step that the reviewer selects whether this check box is selected or not.</p>

2. Add action details necessary to complete the step:

Field	Description
<b>Action Name</b>	<p>Enter the name of the action performed during this step.</p> <p>Workflow steps must have at least one action.</p> <p> To add additional actions to a step, click  <b>Add Action</b>.</p>
<b>Action System Name</b>	<p>Enter a unique, internal name the system uses to identify the workflow action.</p> <p>The system name must be unique within the step.</p>
<b>Description</b>	<p>To add additional details about the action in a step, enter any additional notes.</p>
<b>Function</b>	<p><i>(Optional)</i> Select the job function that the owner of this action should have.</p> <p>To enforce user selection based on function for all deliverables, activities, workflow actions, and gatekeeper selections, use the <b>Enforce on user selection</b> option for the model available on the Pages &amp; Layouts tab within the model editor.</p> <p>Select this check box to limit the selection of users to those who have the function defined. Selecting this option disables the ability to change the function for the workflow action and is enforced even if the function is inactive.</p>
<b>Owner</b>	<p><i>(Optional)</i> Click  to select the user who owns this action.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can</li> </ul>

Field	Description
	<p>assign any user.</p> <ul style="list-style-type: none"> <li>Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p>If an action has no owner, no replacement owner can be selected for the action in the project after the workflow has reached the step containing that action. However, if an action does have an owner selected, a different owner can be selected for the action even after the step has started.</p> <p>Changes to the <b>Owner</b> field are not propagated into existing projects and can only be made by the deliverable owner, Project Manager, and Process Manager at the project level for workflows in existing projects.</p> <p>Only users assigned the Document Reviewer role are available for selection as an action owner.</p>
<b>Permissions</b>	<p>Select what the owner can do in this workflow step:</p> <ul style="list-style-type: none"> <li><b>Can Edit and Publish</b> - The owner can upload and publish a version of a deliverable or activity associated with the workflow for other Accolade users.</li> <li><b>Can Edit</b> - The owner can upload, but not publish, a version of a deliverable or activity associated with the workflow.</li> <li><b>Can Approve</b> - The owner can approve the action in the step for the workflow to move forward, but cannot upload or publish a deliverable or activity.</li> </ul> <p>Select the <b>Can Skip</b> check box if the action can be skipped when there is no owner assigned.</p> <p>If the step contains a single action with no owner, the step is skipped as soon as the step is reached in the workflow process. If the step contains multiple actions, some of which contain owners, the step is not skipped immediately, and the deliverable owner is able to select an action owner during the step.</p>
<b>Auth Req*</b>	<p>Select this check box if the owner of this action must enter authorization credentials to enter a decision on the action.</p>
<b># Days</b>	<p>Enter the number of days from the start of the step until a decision is due. A notification email is sent to the action owner after this time has elapsed. Document owners, Project Managers, and Process Managers can update the number of days within the workflow in a project.</p>



Field	Description
	<p>In the project, a step lasts until the required decisions have either sent the workflow to the next step or returned it to a previous action, step, or the deliverable owner.</p> <p>Changes to the <b># Days</b> field are not propagated into existing projects and can only be made by the deliverable owner, Project Manager, and Process Manager at the project level for workflows in existing projects.</p>
<b>Conditions</b>	Click to add metric conditions that <a href="#">determine if an action is included within the workflow</a> in a project.

\* If your workflow settings require re-authentication, and your Accolade implementation runs in a Windows Authentication environment (not Single Sign-On), consider changing the Authentication Provider on Accolade.Asp under the RemoteAuth directory in the main website to NTLM only. Redirect all hostname traffic to the fully qualified domain name of your server in IIS. This ensures consistency in the workflow behavior across all supported browsers.

- Repeat steps to add additional steps to the workflow.
- Click **Apply** to save your changes.

#### To add automated steps to a workflow:

**Note:** Automated workflow steps should follow the step that activates the automation upon completion. If an automated step is the first step within a workflow, it activates when the workflow starts. If an automated step is the last step within a workflow, the step completes the workflow.

- After creating a workflow, click the **Steps** tab, click **Add Automated Step** in the lower right corner of the page, and complete the following information to identify the automated step:

Field	Description
<b>Automated Step Name</b>	Enter a name that identifies the automated workflow step.
<b>Automated Step System Name</b>	Enter a unique, internal name the system uses to identify the workflow step. The system name must be unique across all workflows.


- Add action details necessary to complete the step:

Field	Description
<b>Automated Action Type</b>	<p>From the drop-down list, select the automated action that occurs during this step:</p> <ul style="list-style-type: none"> <li><b>Set Gate to Today's Date</b> - Select this option to automatically set the gate date to the current date when the</li> </ul>

Field	Description
	<p>previous step within the workflow is completed. If the workflow is in a stage that does not have a gate, the automated step is skipped.</p> <ul style="list-style-type: none"> <li>• <b>Generate PDF from Template</b> - Select this option to automatically generate a PDF that is published as a deliverable or activity version. A deliverable or activity can contain a template assigned to the deliverable or activity, or a template that is assigned specifically to use for generating a PDF from a workflow step. Select which template to use for the PDF generation.</li> <li>• <b>Set Gate Decisions</b> - Select this option to <a href="#">automatically set the gate decision</a> for the upcoming gate based on the calculation of metrics set in the project.</li> <li>• <b>Publish Latest Document Version</b> - Select this option to automatically publish the latest version of the deliverable or activity, thus updating metric values on the project, which provides gatekeepers visibility into the approved metrics. The automated action updates metrics based on the update rights of the previous workflow action owner. If there is no version available, the workflow history indicates no action was taken.</li> </ul>
<b>Automated Action System Name</b>	Enter a unique, internal name the system uses to identify the workflow action. The system name must be unique within the step.
<b>Conditions</b>	Click to <a href="#">add metric conditions</a> that determine if an action is included within the workflow in a project.

3. Click **Apply** to save your changes.

**Notes:**

- To reorder steps in the workflow, click on the arrows next to the name to move the step up or down.
- To delete a workflow step, delete all the actions within the step using the  next to each action. To delete an entire workflow, display the workflow, ensure that is currently inactive, and click **Delete**.
- Updates to a workflow such as adding steps and actions and making changes to **Permissions** and **Can Skip** fields are not copied into the project if a workflow is in progress, but are added when the workflow is stopped and restarted.
- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Adding Conditions That Determine Workflow Actions Availability

Workflow actions can include a set of conditions that determine if they are included within the workflow in a project based on the metric values set within that project. Use "smart" workflows if you want to define one or master workflows for use across multiple projects.

Process Designers can add the "smart" workflow to one or more models, and the metrics within the conditions in the workflow are automatically associated to the model. Document owners can select a "smart" workflow to add to a deliverable or activity within a project. If the metrics within the workflow are not part of the project, the workflow ignores the conditions and the actions *are* included in the workflow. Workflow actions with no conditions defined are always included with the workflow.





### Example

Your company may have a workflow for budget proposals for projects or portions of projects. You may choose to show or hide an action requiring someone's review and approval depending on the total amount in the budget proposal. Smaller amounts may not require a higher level of management or corporate approval, and the reviewers of a proposal across regions may vary.

In this example, define metrics that reflect the budget proposal amount and the region set for the project. Depending on your setup, these may be calculated metrics based on other values. Within the workflow action configuration, define conditions that include the region and budget proposal metrics and the values required for the action to be part of the workflow.

### To add a condition that determines a workflow action's availability within a project:

**Note:** Prior to adding a workflow condition, determine the metric names and values to use to create the conditions that show a workflow action.

1. From the **System** menu, select **Process > Workflows** and select the workflow, or [create a new workflow](#).
2. Ensure the **Is Smart** option is selected, and create workflow steps as described above.
3. If necessary, click the **Steps** tab to display the steps and actions defined for the workflow.
4. In the **Conditions** field for a manual or automated action, click  **Add New**.
5. Click , select a metric to include as a condition, and click **Select**.  
Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the action to be included within the workflow.  
  
If the project's metric setting does not meet this value, or the project does not include the metric, the action is not included in the workflow within the project.
7. Repeat step 4 to add additional conditions that must be met for the workflow action to show.

If multiple conditions are entered, all conditions must be met for the action to be included in the workflow within the project. If conditions dictate that no actions are needed to complete the workflow, the workflow automatically runs to completion and displays in the associated deliverable and workflow history as **Completed**.

To edit a condition, click  to delete it and repeat step 4.

8. Click **OK** to return to the workflow steps.
9. Click **Apply** to save your changes.

**Notes:**

- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Setting Gate Decisions Using Workflows

Workflows can include an automated step that sets the decision for the upcoming gate based on metric values set within the project. The decision for the gate is automatically set according to the metric conditions set within an automated step for each decision type, removing the need for manual entry of gate decisions or gatekeeper voting.


**Note:** Process models can also be configured to automatically set a gate decision based on a set of metric conditions. Sopheon recommends using the **Automated Gate Decision Rules** settings within the process model or a workflow automated step to automate gate decisions, but not both.

When a workflow reaches the automated step to set the gate decision, Accolade processes the decisions in the following order and sets the decision to the first one that matches the metrics assigned:

- Go
- Kill
- Hold
- Recycle
- Pending Decision

Gate decision names, such as **Go** and **Hold** are fully customizable and may differ for your Accolade installation. See your company's Process Designer for the names your company uses for these decisions.

A Conditional Go decision cannot be set using an automated gate decision and event reasons are not captured for automated gate decisions.



 Setting gate decisions to set automatically does not prevent a gate owner from entering a decision manually and updating gate details. To ensure that gate details are not modified after setting the gate decision, consider setting the gate data to read-only using the **Set Gates Page to read-only** option in the process model.

Each workflow can have only one automated step that sets the gate decision. An automated gate decision step does not prevent steps after it from running. Additionally, if a project is set to require gatekeeper approval to pass a gate, the gate decision is set to Proposed.

### To set a gate decision using an automated step in a workflow:

**Note:** Prior to adding a gate decision automated step, determine the metric names and values to use to create the conditions that set each decision type.

1. From the **System** menu, select **Process > Workflows** and select the workflow, or [create a new workflow](#).

2. If necessary, click the **Steps** tab to display the steps and actions defined for the workflow.
3. Click **Add Automated Step** and select **Set Gate Decision** as the automated action.
4. For each gate decision listed, click the gate decision link and complete steps 5 to 7.
5. Click , select a metric to include as a condition, and click **Select**.  
Use the **Category** and **Search** options to refine the list of metrics.
6. For the added metric, select or enter the value the metric must meet within the project for the gate decision to be set, and click **OK**.
7. Repeat step 5 to add additional conditions that must be met for the decision to be set.  
If multiple conditions are entered, all conditions must be met to set the gate decision.  
To edit a condition, click  to delete it and repeat step 5.
8. Click **OK** to return to the workflow steps.
9. Click **Apply** to save your changes.

**Notes:**

- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Migrating Projects After Workflow Completion



Workflows can include rules that migrate a project to a different model after the workflow has been completed and approved. When the workflow is completed, Accolade uses the metric settings and the workflow migration rules set in the workflow configuration to determine which migration maps to use and automatically migrates the project. Automating project migrations using workflow migration rules removes the need to manually migrate a project after a workflow has been completed.

Consider the following when configuring a workflow to start a project migration:


- Only approved workflows can start a project migration. Workflows that are completed but rejected do not start the migration.
- A single workflow can contain multiple rules that result in a single project being migrated multiple times.
- All other workflows in the project are stopped when the project migration starts. Ensure that your configure is set correctly so that workflows that contain finish conditions, such as setting gate decisions, are not stopped before those events take place.
- If a migration map is set to close the original project after the migration, all migrations complete before the original project is set to Closed.

- If a migration map does not contain the correct model setup, the migration does not complete.

#### To migrate a project after a workflow has completed:

1. From the **System** menu, select **Process > Workflows** and select the workflow, or [create a new workflow](#).
2. In the **Migration Map Rules** table, click , enter a unique name and system name to identify the rule, and select the migration map that Accolade uses for the automatic migration.
3. Click on the **Conditions** to define the metric conditions that must be met to migrate using the selected map.
4. Click , select a metric to include as a condition, and click **Select**.  
Use the **Category** and **Search** options to refine the list of metrics.
5. For the added metric, select or enter the value the metric must meet within the project for the workflow approval to trigger the migration, and click **OK**.  
Repeat as necessary to add additional conditions that must be met for the workflow to start the project migration. If multiple conditions are entered, all conditions must be met for the project to migrate.
6. Repeat steps 2-5 to add migration rules for other migration maps.  
You can define multiple rules for the same migration map.
7. Click **OK** to return to the workflow configuration.
8. Click **Apply** to save your changes.
- 9.

#### Notes:

- To delete a migration rule, click  next to the rule in the **Migration Map Rules** field.
- Collaborative Workflow is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).
- When workflow migration starts the Project Leader and WF Action Owner will receive notifications that migration has begun, and when it completes these users will receive a notification that migration has completed with information about the migrated project.

## Additional Reference Information Overview

Reference tables make a variety of reference information available to users through reports and in documents for use as deliverables and activities. Reference tables are also used to

import data, such as resources and project links into Accolade. Reference tables not only contain standard reference information, such as cost tables and specification sheets, but can contain currency conversion rates, strategic corporate targets or limits, and even custom terms that you might want to expose in documents using the REFTABLE field code.

Administrators and Process Designers upload the initial version of a table to Accolade and assign an owner to the table. The owner maintains the table and updates it as necessary. Later versions of tables can be uploaded manually or automatically. Most reference tables are spreadsheet files either created manually using the Accolade Office Extensions add-in, or using online reports. Accolade also supports uploading reference tables in CSV and XML files, both manually and automatically.

Using reference tables, you can:

- **Import data into Accolade** - Use a set of paired reference tables to import large amounts of data into Accolade. Specifically, you can use named pairs of reference tables to import resources, pools, capacities, and demands; projects and project links; matrices; metric security; and security list information. See ["Importing Project Data and Configuration" on page 425](#) for more information.
- **Maintain currency conversions** - Create a reference table that contains the date-specific exchange rates for the currencies your company uses. As exchange rates change, the reference table manager can add additional rows to subsequent versions of the table while still preserving the exchange rates for prior dates. See ["Defining the Currencies Used in Your Company" on page 410](#) for more information.
- **Include data in deliverables and activities** - Display individual reference table values in deliverables or activities using Accolade field codes with the REFTABLE source. To display correctly, these tables must have unique values in each row of the first column of the table so that the row can be identified in the code. In addition, it is possible to display an entire reference table in a deliverable or activity.

### Reference Table Security

Each reference table is added to an access group so it uses that access group's security. Like security for projects, security for reference tables affects the data that displays in reports and what displays in Search results:

- Users can only refresh a report containing a reference table if they have the rights to the table.
- Users can only see the content of reference table field code if they have access rights to the table.

The access group security does not extend to the creation and ownership of a reference table. It is possible for a Reference Table Managers to be assigned to tables that they do not have access rights to, although this would usually be poor practice as the manager could not view table contents in reports.



If automatic uploading of reference table versions is enabled, the security of the ultimate source of the new versions must be configured outside of Accolade, by controlling which users have access to the local and remote file locations used for upload.

## Requirements and Considerations for Reference Tables

Anyone in your organization can create a reference table. Users with full Reporting Rights can use the Accolade Office Extensions add-in and online reports to create the table automatically with the correct placement in a worksheet. You can also create tables manually. After a table is created, Administrators and Process Designers [add the table definition](#) to Accolade and upload the file.

Accolade supports reference tables as spreadsheet, CSV, and XML files through the Reference Tables page, and through an [auto-loader service](#). The information and examples provided are in spreadsheet format.

### Reference Table Requirements

A table within a workbook must meet the following requirements to be used as a reference table in Accolade:

Component	Requirements and Considerations
<b>Size and Location</b>	<ul style="list-style-type: none"> <li>• Have at least one column and two rows.</li> <li>• Must start in cell A1 in the worksheet.</li> <li>• The first blank cell in the top row determines the right edge of the table.</li> <li>• The first blank cell in the left most column determines the bottom of the table.</li> </ul>
<b>Column Headings</b>	<ul style="list-style-type: none"> <li>• Must be in the first row in the worksheet; therefore, the first column heading is in cell A1.</li> <li>• Can be named anything, and the name is used as the column's display name within Accolade. Any characters other than letters, numbers, and underscore, and any numbers before the first letter are removed to create the column's system name.</li> <li>• Must be unique within the table, and are case insensitive.</li> </ul>
<b>Data</b>	<ul style="list-style-type: none"> <li>• Starts in the second row in the worksheet, directly under the column headings.</li> <li>• Is either a number, date, or string. Accolade recognizes three types of data in table columns: number, date, and string.</li> </ul> <p>Accolade determines the data type of each column using the initial contents of the column when the</p>

Component	Requirements and Considerations
	<p>table is uploaded for the first time. To force a column containing only numbers or only dates to be defined as string type, add a letter in at least one row of the column in the initial upload. You can delete the letter from the next version, but the data type remains "string".</p> <ul style="list-style-type: none"> <li>• All dates are in mm/dd/yyyy format.</li> <li>• The decimal separator in numbers must be a period (.).</li> </ul>
<b>Accolade Field Codes</b>	<p>To make the table's values display using Accolade field codes, for example in documents or calculated metrics, every value in the table's leftmost column must meet the following criteria:</p> <ul style="list-style-type: none"> <li>• Be unique (case insensitive) in the column.</li> <li>• Begin with a letter.</li> <li>• Contain only letters and numbers.</li> <li>• Contain no more than 16 characters.</li> </ul> <p>In addition, the <b>Unique values in first column</b> check box must be selected on the Reference Table page when the <a href="#">table is added in Accolade</a>.</p>

### Reference Table Limitations

Reference tables contain the following limitations:

- There can be only one reference table per workbook. You can create templates and documents using the Accolade Office Extensions add-in. However, when building a reference table, the spreadsheet file can have only one table that is considered a reference table.
- Versions after the first can have more columns than the first version, but cannot contain fewer columns.
- Each cell in the table has a 500 character limit.
- The broken bar (|) character is prohibited. Use the pipe (|) characters instead. Many keyboards contain a key that displays a broken bar but that actually inserts a pipe.

### Identifying the Worksheet that Contains the Reference Table

The reference table must exist on what is considered to be the first worksheet. In a file where the worksheets have been renamed, rearranged, or hidden, and it is no longer which worksheet is the first, create a custom document property called **SGM\_RefTableSheet** and enter the name of the worksheet that contains the reference table as the custom property's value. Refer to Microsoft's online Help for information about adding custom properties to files.

## Adding Reference Tables

Anyone in your organization can create a reference table. However, only Administrators or Process Designers can add the first version of a reference table to Accolade. After a reference table is added to Accolade, its table owner can then upload later versions and set it for [automatic upload](#) to maintain the contents of the table.

### To add a reference table to Accolade:

1. From the **System** menu, select **Content Sources > Reference Tables**.  
To narrow the reference table list, search by the table name, system name, or category.
2. Do one of the following:
  - **To add a new reference table** - Click **Add New** in the upper right corner of the page.
  - **To edit the details of an existing reference table** - Click the name of the reference table to open it for editing.
3. Complete the following information to identify and describe the content of the reference table:


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**Important!** Reference tables used for project data or resources imports have unique naming requirements.


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

Field	Description
<b>Name</b>	Enter a unique name, up to 80 characters long, which identifies the reference table.
<b>System Name</b>	Enter a unique name that identifies the table in reporting views, reports created using the Accolade Office Extensions add-in, field codes, and other places in Accolade.  The name must be unique among reference tables and can contain only letters (English alphabet), numbers, and the underscore.
<b>Description</b>	Enter a description of the purpose or nature of the reference table.  This description helps other users identify the reference table throughout the system.
<b>Category</b>	Enter or select the group to which this reference table belongs.


Field	Description
	<p>Use categories to organize like tables together. For example, you may choose to group all the reference tables used to import data into the same category, in order to separate them from tables that provide additional reference information for users.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Owner(s)</b>	<p>Click  and enter users that can own updating the details and versions of this table.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p>Table owners maintain the content of the reference table after its initial upload.</p> <p><b>Note:</b> Only users with the Reference Table Manager user role are available to select as table owners.</p>
<b>Configuration Access Groups</b>	<p>Select the <a href="#">access group</a> to which the reference table setup belongs. A user must be assigned to the same access group as the reference table to edit details such as the name, system name, etc.</p> <p><b>Note:</b> Only <b>Owners</b> are able to upload new versions of files.</p>

Field	Description
<b>Access Group</b>	<p>Select the <a href="#">access group</a> to which the reference table content is available to. A user must be assigned to the same access group as the reference table to see the table and use the data within it.</p> <ul style="list-style-type: none"> <li>To make the table and its contents available to all users, select <b>[None] - Accessible by all users</b>.</li> <li>Select <b>[None] - Accessible by all users</b> when adding the currency reference table.</li> </ul> <p><b>Note:</b> Administrators and Process Designers can create reference tables that are outside their access group rights; however they cannot see or modify the tables after creation.</p>

- In the **File** field, click  and select the spreadsheet, CSV, or XML file that contains the reference table.

**Note:** If containing special characters, the uploaded CSV file *must* be an UTF-8 encoded file.



The columns from the table in the uploaded file are loaded and display in the Column Definitions section of the page.

 Column data types are automatically determined based on the reference table information included in the initial upload, either when adding a new reference table or when adding a new version with new columns to an existing table. If desired, **Number** and **Date** data types for new columns can be changed by clicking on the Data Type drop-down and selecting **String**. Once the columns have been added and you click **Create** or **Apply**, existing data types are not able to be changed in later versions of the table.


- Select the **Unique Values in First Column** check box if the table contains unique values in each row of the table's leftmost column. Selecting this option allows cell values to display using [Accolade field codes](#) and to reference a cell in the table in [calculated metrics](#).

**Note:** If selected, you cannot change this setting in later versions of the table.

- Complete the information about version limits and how the file is updated to Accolade.

Field	Description
<p><b>Versioning</b></p>	<p>Select how many versions of the table to save in the database. If you enter a maximum number instead of selecting <b>Unlimited</b>, older versions of the table are discarded as newer versions are added.</p> <p> Sopheon recommends adding no more than 250 versions of a single reference table.</p>
<p><b>Loading Schedule</b></p>	<p>If you want to enable <b>automatic loading</b> of new versions of the document through either a directory on the application server or an FTP website, select an option to upload a version immediately or at a scheduled time each day.</p> <ul style="list-style-type: none"> <li>• <b>Load immediately</b> - Loads any files placed in the drop box folder on the application server immediately.</li> <li>• <b>Daily at</b> - Loads any files placed in the drop box folder on the application server at the time you specify. Note that this field is in 24-hour time. To upload all files at 10:00 pm, enter <b>22:00</b>. The time entered is the time in the application server's time zone, which may be different than the time zone you are in when entering the time in Accolade.</li> </ul> <p>If the reference table is assigned to an access group, the user assigned the Service Account user role must be assigned the same access group for the reference table to automatically upload.</p> <p> If you are creating reference tables for data import and the imports are large, schedule them to run overnight. Reference tables for information such as currency exchanges are smaller and can load immediately.</p> <p>If you do not want to enable automatic loading for the reference table, select <b>Off</b>.</p>

7. Select one or more of the "Available to" options to make the contents of the table available to other portions of Accolade.

Field	Description
<b>Available to Metrics</b>	Select this check box to make the content within the table available for use in metrics, for example, when defining list values or to use in creating <a href="#">cascading list</a> or <a href="#">calculated metrics</a> .
<b>Available to Portfolio Optimizer</b>	Select this check box to make the content within the table available to Accolade Portfolio Optimizer, for example, for strategic bucket charts or calculated metrics tables.
<b>Available to Reporting</b>	<p>Select this check box to allow the reference table to be used in reports created in Accolade Online Reporting or reports created using the Accolade Office Extensions add-in. For example, select this check box for reference tables that contain information that is valuable to report and track for historical purposes, such as those used for currencies or target information.</p> <p> A reference table must also be added to Accolade as an online report in order to be available to use in reporting. The reference table information is included by selecting the <b>Reference Tables</b> option when selecting columns to be included in the report. See <a href="#">"Creating Online Reports within Accolade"</a> on page 266.</p> <p>Clear this check box for reference tables used for importing data into Accolade or for tables that hold values for configuration, such as cascading list metric values.</p>


8. Click **Create** to create the new reference table or **Apply** to save your changes to an existing table.
9. Review and update the column definitions to provide additional information about the columns in the reference table.

Field	Description
<b>Display Name</b>	<i>Read-only</i> The display name, based on the column headings from the uploaded file.
<b>System Name</b>	Confirm or modify the system name for each column. Column system names must begin with a letter and contain only letters, numbers, and the underscore character. They can be abbreviated to make them easier to use in queries, reports, and Accolade fields.
<b>Data Type</b>	<i>Read-only</i> The data type for the column.

Field	Description
<b>Number Format</b>	For columns that contain number metrics, enter a custom number format to use when data in Number type columns is displayed in Smart documents. See " <a href="#">Custom Format for Number Metrics</a> " on page 158 for more information.

10. Click **Apply** to save your changes.

**Notes:**

- To add version notes to a reference table, display the reference table details. In the **Versions of the Reference Table** section of the table, click in the reference table's Comments section to add comments, and click **Apply** to save your changes.
- To delete a version of a reference table, display the reference table details. In the **Versions of this Reference Table** section of the table, click  for the version that you wish to delete and click **Apply** to save your changes. You cannot delete all versions of a reference table.
- To delete a reference table, display the reference table details and click **Delete** in the lower left corner of the page. Reference tables that are used in list metric definitions cannot be deleted until the metric no longer references the table.



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## Chapter 4

# Designing Charts and Reports

Reporting in Accolade provides a means to summarize and analyze project and other data within your database, in a format and manner that is most applicable to your organization and data needs. Reports can range from user login attempts to much more complicated reports used to analyze projects and completion efficiency or financial information.

Reports can include:

- Metrics
- Project metadata
- System data, such as user information
- Accolade field codes
- Reference table fields

Creating and adding reports within Accolade requires that you complete the following:

1. Determine what report type to create.
2. Define the basis for the report. This is a shell or template structure. When reports are viewed they are populated with data from Accolade.
3. For MS Excel and HTML Reports, add the report to Accolade. Online reports created within Accolade are added automatically.
4. Assign who has access and where the report displays.

## Report Formats

Reports in Accolade can exist in the following formats:

- **Accolade Online Reports** - [Online reports](#) created within Accolade are built and viewable directly within the application without having to write a SQL query. These reports provide an on-demand reporting experience and can be used for the creation of Accolade charts. The ability to create and modify online reports is available to any Accolade user assigned All Reporting Rights, and anyone with Refresh Workbook Data rights can view these reports. These reports can be added to the **Charts & Reports** page within Accolade, and can be added to a pod within a layout in order to view them in projects.
- **HTML Reports** - [HTML reports](#) can be built using a single SQL query to gather data from the database, and display as a table in a secondary browser window. This format has no additional formatting available, so can be useful for simplistic reports, for example, to determine where process models are being used or to review user access history. HTML reports are also available for users to send or receive via email. These reports can be added to the **Configuration > Charts & Reports** tab within Accolade and can be added to a process model for availability in a project.
- **MS Excel Reports** - [MS Excel reports](#) are built and viewable in Excel, provide flexibility in formatting, and are created using the Accolade Office Extensions add-in application. The add-in provides an interface to create a data report based on Accolade data. You can also create MS Excel reports using a template and the Accolade query infrastructure, creating reports based on data pulled into the spreadsheet using queries. These reports can be added to the **Configuration > Charts & Reports** tab within Accolade and can be added to a process model for availability within a project.

Each report type can contain the same data. The report type you choose to build depends on where the report needs to display within Accolade, the means you want to use to build the report, and the amount of formatting required to make the data within the report useful when viewing.

## Report Access










Anyone in your organization can design a report, and anyone with All Reporting Rights can create and save an online report. However, only Administrators and Process Designers can create MS Excel or HTML reports, or set online reports as available for all users to view within Accolade. Only Process Designers can associate a report with a process model to display within a project.

Users must have either Refresh Workbook Data or All Reporting Rights for access to view shared reports in the **Charts & Reports** page and through the projects to which they have access. If the report is restricted by role and/or by access group, users must have a system user role that matches the report and/or be assigned to an access group that matches the report.

Additional rights are required to create and refresh report data using the Accolade Office Extensions add-in.

## Chart Formats

Charts in Accolade can be created using an Accolade online report as a source, and can exist in the following formats:

-  - Bar charts
-  - Grouped bar charts
-  - Stacked bar charts
-  - Bubble charts
-  - Line Chart by Columns charts
-  - Line Chart Trends charts
-  - Pie charts
-  - Radar charts
-  - Unknown or custom charts

The chart type you choose to build depends on the data to be displayed, so it is important to select appropriate data types to render a meaningful chart.

## Charts Access

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

Users must have either Refresh Workbook Data or All Reporting Rights for access to view shared charts in the **Charts & Reports** page and through the projects to which they have access. If the chart is restricted by role and/or by access group, users must have a system user role that matches the chart and/or be assigned to an access group that matches the chart.

## Reports Best Practices

Keep the following set of best practice recommendations in mind when creating and planning charts and reports:

- **Consider Project and Data Security** - Remember, reports respect the security features such as access groups and security lists that Administrators have defined within the system. For example, users who select to receive an HTML report through

email receive a report that contains only information for projects to which they have access. However, reports contained in emails, including those added as attachments, can contain private information that should not be shared internally or externally. Use the **Report Privacy Warning Text** system parameter to add a line of warning text to Accolade Online reports, HTML reports, and reports created using Accolade Office Extensions, to indicate the private or confidential nature of the report contents. The parameter provides 500 characters for the message.

In addition, all reports created using Accolade Online Reporting and Accolade Office Extensions contain a custom property that identifies the generated file as a file with Accolade data. To help ensure sensitive data is not forwarded, use the filter options on your email server to prevent files that contain the custom property from being forwarded using email.

- **Choose the Best Report Format and Creation Method** - The report type you choose to build depends on where the report needs to display within Accolade, the means you want to use to build the report, and the amount of formatting required to make the data within the report useful when viewing.

Method	Advantages
<b>Accolade Online Reporting</b>	<p>Accolade Online reports use a reporting interface similar to that provided with the Accolade Office Extensions, but without having to leave Accolade and without having to access Excel.</p> <p>Accolade Online reports provide an on-demand, in-application way to generate a report and ensure that the report always displays the real-time data from Accolade.</p>
<b>Accolade Office Extensions</b>	<p>Accolade supports .xlsx, .xlsm, .xltx, and .xltm file types for MS Excel reports. Accolade Office Extensions provides an interface to create a data report. Creating reports in Excel also allows for Excel formatting, as necessary.</p> <p>You can use reports created with Accolade Office Extensions in your process documents, add them to related documents, email them, use them for your own research, or (if you are an Administrator or Process Designer) you can activate them on the <b>Configuration &gt; Charts &amp; Reports</b> tab or on the <b>Reports List</b> pod in projects.</p>
<b>SQL Queries</b>	<p>Complicated tables may require the use of SQL queries, for example, tables that require aggregations other than sum, average, minimum, maximum, or standard deviation, or in tables with filters joined with "or".</p>

Method	Advantages
	<p>SQL queries leverage the reporting views to gather data from the Accolade database and require some knowledge about writing a successful query to gather the information you want. You can also write your own custom reporting views to retrieve information from the database.</p> <p>When you create charts and reports based on SQL queries, you can include them on the <b>Charts &amp; Reports</b> page or on the <b>Reports List</b> pod in projects, but you cannot add these reports to documents or use them in the other ways that are available to Excel reports.</p>

## Accolade Online Reporting Overview

Accolade Online Reporting provides an on-demand reporting option and can be added to the **Charts & Reports** page within Accolade. Any Accolade user assigned All Reporting Rights can create online reports within Accolade.

An online report consists of the following components:

- **Data columns** - Determines the area of the database, for example Projects or Access Groups, that are available to retrieve information from.
- **Filters** - Specifies the criteria to match to include data in the report from specified columns.
- **Users** - Indicates which Accolade users have access to view and edit the report. Each selected user must have report refresh rights to see the report. Users with all Reporting Rights also have access to change the selected columns and filters within the report definition.

## Creating Online Reports within Accolade

Online reports provide an on-demand reporting option and can be added to the **Charts & Reports** page within Accolade. Any Accolade user assigned All Reporting Rights can create online reports. Generated content can be added as a report in a project by [adding a Report pod to a layout](#), and then adding the layout to a process model.

- 💡 Use the **Report Privacy Warning Text** system parameter to add a notification within the report to indicate the content is private or confidential, and should not be forwarded to others.




### To create an online report within Accolade:

1. From the **Workspace** menu, select **Charts & Reports**.

To narrow the list, search by the report name or category.






**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.


2. Do one of the following:



- **To add a new report** - Click **Add New** and select **Online Report** from the drop-down list.
- **To copy an existing report** - Locate the report you wish to copy on the **Charts & Reports** page.
  - Click  in the **Copy** column. Select, add, or rearrange the columns you wish to keep. You can also add filters and advanced matrix settings. Click **OK** to save changes and progress to the next step. Give your newly copied report a name, a system name, a category, and a description. Decide if you wish to transpose the column and row data. Click **Save** to create the report.
- **To edit an existing report** - Click the name of the report on the **Charts & Reports** page to open it for editing, Click  to edit the report columns, or click  to edit the report details.

- 💡 Only users assigned as report owners and Process Designers with All Reporting Rights can edit report columns and details.

3. Select a subject from the drop-down list, such as **Projects** or **Users**, to display the column sets available within that subject.
4. Double-click or drag and drop the column names from the left side of the dialog to any area in the **Selected Columns** tab to include the column in the report.

- To search for a column, enter search criteria in the **Find** field after selecting the subject.
  - Use the  and  options to expand or collapse the subject data sets in order to select specific column options.
  - To include an entire column set, drag and drop the column set to the **Selected Columns** tab.
  - To change the column order of selected columns, drag and drop a column into a new location within the list.
  - To display the totals for number columns, check the Show Totals option to indicate that you would like to sum up a number column into a Totals row at the bottom of the report.
  - To remove a column, click  in the corresponding row.
5. *(Optional)* Refine the content of the report as necessary using one or more of the following options.
- **Rename columns** - Click in one or more selected columns and enter a new column name that is more appropriate for the report you are creating.
  - **Set column sorting** - Click  next to one or more selected columns to indicate whether the column is sorted in ascending or descending order. If you select more than one column to sort by, indicate the order in which the columns sort; 1 being the primary sort, 2 the secondary sort, and so on.
  - **Create project links** - If the **Project Name** report column is selected for inclusion in the report, select the **Is Link** check box to make the project name in a report linkable to the project's home page.
  - **Define column properties** - In the **Properties** area, define the column display and behavior including grouping items together to aggregate them and Excel date intervals. Aggregate selections are only available for number metric columns.  
For example, to summarize the total costs for all projects within a brand, select **Sum** as the aggregate value in a column that represents the total costs for a project. The aggregation displays automatically when the report is selected to display in a chart.
  - **Data Format** - If the column contains a date or a number, select how the data should be displayed. The currency symbol that displays for numbers is defined in the **Currency Symbol** system parameter.
  - **Hide columns** - Make a selection in the **Show** check box to show or hide columns within the displayed report.
  - **Add Count Column** - If you select to summarize values within the report, click  **Add Count Column** to add a column that shows how many rows of source data are combined in the summary row.



 You can order and rename the added column as you can other columns; however, you can add only one **Count** column to the report.

- **Add Calculated Column** - Click  **Add Calculated Column** to [add a column to the report that displays a calculation based on other column data](#).
6. *(Optional)* On the **Selected Filters** tab, double-click or drag and drop the column name from the left side of the dialog to any area in the **Selected Filters** tab to use it as [filter criteria that data must match](#) to be included in the report.
  7. On the **Advanced Matrix Settings** tab, if more than one matrix was selected in the report columns, click  **Add** to [add the matrix join definitions](#).
  8. Click **OK** to exit the dialog and return to the report settings.
  9. Enter the following information to identify the report:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the report.
<b>System Name</b>	Enter a unique, shorter name that identifies the report in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among online reports and can contain only letters (English alphabet), numbers, and the underscore.
<b>Category</b>	Enter or select the group to which this report belongs.  Use categories to organize like reports together. For example, if there are a large number of reports that the IT department uses to track user logins, use a category to group those reports together. <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	Enter a description of the purpose or nature of the report.  This description helps other users identify the report throughout the system.



Field	Description
<b>Transpose</b>	Select this check box to transpose the column and row data when the report is rendered.
<b>Owners</b>	<p>Click  and select the additional users who can edit the report configuration.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the report. An assigned owner who has Refresh Workbook Data rights will only be able to view the report. To make the report available for all users or for configuration setup, you must have a Process Designers with All Reporting Rights as an assigned owner.</p>



10. (All optional, available in configuration only) Enter the following information to make the chart publicly available.

Field	Description
<b>Override project filtering</b>	<p>Select this check box to include the entire report set from within a project.</p> <p>The report will not filter to project-specific data when viewed from within a project, and will <b>display all projects in a portfolio</b> regardless of security.</p>

Field	Description
	*Note* This check box will not be available for selection if the Filter to Portfolio check box is selected.
<b>Filter to Portfolio</b>	<p>Select this check box to display the Portfolio Levels To Display slider.</p> <p>*Note* This check box will not be available for selection if Override Project Filtering check box is selected. This check box is optional and is not mandatory.</p>
<b>Portfolio Levels To Display</b>	<p>Select this toggle as well as the Filter to Portfolio check box so that the report will filter to that project Portfolio Hierarchy instead of the default of filtering down to just that project.</p> <p>*Note* This toggle is optional and is not mandatory.</p>
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the report publicly available for users to access and view the report.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the report in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	Select this check box to make the report available for use in configuration.
<b>Roles</b>	<p>Select the user roles that have access to view the report.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the report on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is selected, access groups must be defined for the report.</p> <p>The access groups displayed are based on the current user's access group permissions and the access groups the report belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the report.</p>
<b>Process Model Usage</b>	Click the <b>Process Model Usage</b> button to see a list of process models that the online report is associated with.


Field	Description
	The list includes all process models the report is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.

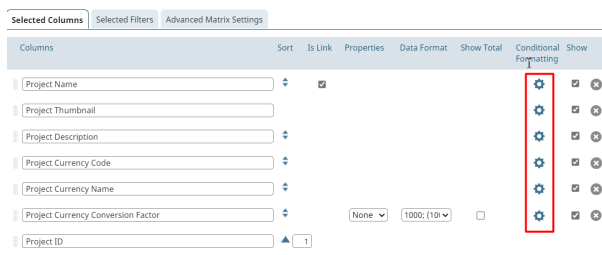
**Note:** Clicking either **Available to** check box will place the report in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the report will only be available to the assigned owners in their **My Charts & Reports** section.

11. *(Optional, available in configuration only)* [Set up the report for export](#).
12. *(Optional)* Click  in the upper right corner to display a preview of the report contents prior to saving, or click  to download the report to a spreadsheet file.
13. Click **Save** to create a new report, or to save changes to an existing report.

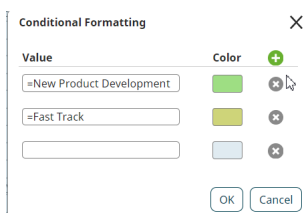
## Conditional Formatting in Reports

Accolade users need an easy way to focus on the most critical information in the report. Users can easily use conditional formatting on report columns such as date, number, or text to focus attention on the key data to drive decisions on projects. Users can specify a formula that tells the report how to color the background of the cells in a given column. For example, while setting up the report, one can choose to highlight the project duration column which will show the long-running projects as risks. The user would be specifying the criteria such as a project running greater than 500 days will have the color red, projects running between 200 and 500 days will be yellow, and projects running less than 200 days will be green. This will effectively highlight projects that have been running for a very long time.

1. Access the report you wish to configure.
2. Click the **Settings** icon  at the top right of the report page. The **Selected Columns** screen will appear.



3. Select the Settings icon in the **Conditional Formatting** column. The **Conditional Formatting** modal will appear.



4. Configure the fields. Click the **OK** button when finished.
5. Click the OK button on the **Select Columns** page to finalize preferences.

## How Do I Know the Feature is Working?


Users have the ability to input formulas into the Value fields of the Conditional Formatting modal. Use Rational and Logical Operators to express what actions should take place when the desired criteria is met. Follow the steps below to guide you through this feature. IF help is needed, use the Valid Operators as a reference.

Relational Operators	Logical Operators
= (Equals)	Or,    (Double Pipe)
<> (Does Not Equal)	And, &&
>= (Greater Than or Equal To)	
<= (Less Than or Equal To)	
> (Greater Than)	
< (Less Than)	

- To make a valid formula, you need at least one of the relational operators from the table above, and at least one value.
  - i.e. = Red
  - i.e. >=0
- If you're using any logical operators (i.e. &&) then you'll need at least 2 relational operators and at least 2 values per logical operator.
  - i.e. >1 || <0
- Comparisons to Dates need to be specified in the YYYY-MM-DD format.
  - i.e. < 2025-03-25, if you want all dates less than March 25th 2025 to be formatted.

### Notes:

- To delete a saved online report, click the name of the report on the **Charts & Reports** page and click **Delete** at the bottom of the page. Only the report owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the report.
- To include a project's thumbnail image in the report, add the **Project Thumbnail** column available in the **Project Details** column set.
- A reference table must also be added to Accolade as an online report in order to be available to use in reporting. The reference table information is included by selecting the **Reference Tables** option when selecting columns to be included in the report.
- The process model determines whether the report is available at the project

level. When viewed through a project, only data that pertains to that project displays in the report, unless **Override project filtering** is set in the report configuration. Non-project related information displays identically in both locations. Click  on the **Reports** page of the project to print the list of charts and reports that display.

- Using filters that reference data with square brackets may not return correct results. It is not recommended to use square brackets in naming projects or other Accolade data, as these characters are not supported in filtering and calculation functionality.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Data Format** field when creating charts and reports.
- Users can now use the phrase "NULL\_OR\_EMPTY" in the Conditional Formatting feature to format NULL/[EMPTY] values (Determined by the Replace Empty Values parameter 1 ([EMPTY]) 0 (NULL)).

## Adding Calculated Columns to Online Reports

Reporting details can be contained in multiple sources within Accolade. To combined related data values to be used for reporting or the creation of charts or presentations, users can create reports that include calculated columns that calculate and/or display combined data, allowing users to manipulate and analyze Accolade data values.

For example, a user may have several different project metrics that represent categories of project costs such as Administrative, Operating, Marketing, etc. In order to calculate and display the sum of these project costs within an Accolade report or chart, the user can include a calculated column in their report setup.

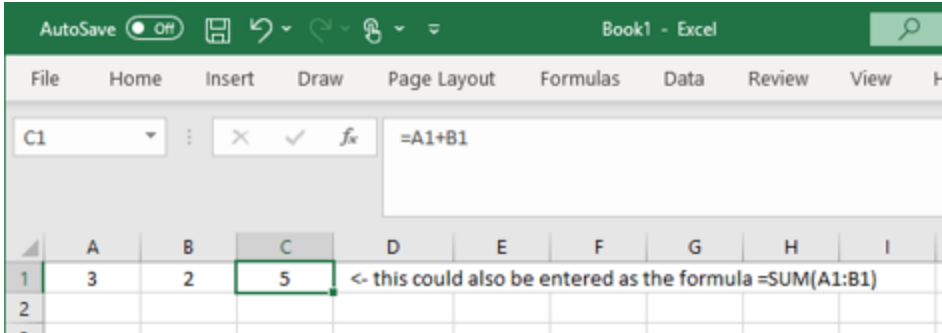


### Example

Writing a calculated column formula in Accolade is slightly different than writing an equation in math class, or using formulas in Excel. The most notable difference is the use of the equal sign (=).

For example, if you want to add the numbers 3 and 2:

- In math class, the equation would read **3+2=**, with a calculated value of **5**.
- In Excel, formulas start with the equal sign, so it would look like **=3+2**. When entered, the value in the selected cell would return as **5**. If you wanted to add two cell values, it would look something like **=A1+B1** or **=SUM(A1:B1)**. Assuming the values in A1 and B1 were 3 and 2 respectively, it would return the value **5**.



- In Accolade online reporting, the equal sign is assumed, so it does not need to be included in the formula field. If you wanted to add the values of Column A and Column B, it would look like **[Column A] + [Column B]** or **Sum([Column A], [Column B])**. Assuming the first row values of Column A and Column B were 3 and 2 respectively, it would return the value **5**.

**Example Report**


WARNING: Do not share confidential information. Violators will be prosecuted!

Project Name	Column A	Column B	Sum of Columns A & B
Project Example 1	3	2	5
Project Example 2	4	9	13
Project Example 3	2	7	9

**To add a calculated column to an online report:**

**Note:** See below for a list of calculations that are currently supported for reporting.

1. [Create a new report or open an existing report for editing.](#)
2. On the **Selected Columns** tab, ensure the columns to be used in the calculation are included in the report.

 Report calculations are executed from left to right. In order for selected columns to be used in a calculated column, they must a) be selected as a column for the report, and b) be included before they are referenced by a calculated column (this means they must appear to the left of the calculated column when displayed, or above the calculated column when selecting columns in the report setup).


3. Make a selection in the **Show** check box to show or hide columns within the displayed report.

If you want to use the columns as a reference for calculated column formulas but do not wish to display them in the report, clear the Show check box. Hidden columns can still

be used as a reference for calculated columns, but will not appear in the report when displayed.

4. Click  **Add Calculated Column**.



The column is added with two fields - one for the display name for the column, and one for the formula to be calculated.

5. In the top field, enter the column name to be displayed when the report is generated.
6. In the  field, enter the formula to be calculated within the report.

When entering your formula, the columns are referenced by enclosing the column display name inside of square brackets. In the example above, Column A is entered as **[Column A]**.

7. Select the appropriate datatype for the calculated column.
  - **Date** - Select this option when you want the column data to display as a Date datatype, for example when using the DateAdd function to project a future project date.
  - **Number** - Select this option when you want the column data to display as a Number datatype, for example when using the Sum function to combine the values of two or more columns of expense values.
  - **String** - Select this option when you want the column data to display as a String datatype, for example when using the Concatenate function to display user name and functions combined in one column.
7. *(Optional)* Drag and drop the calculated column to a new location within the list.

Note that while the calculated column cannot be displayed in the report until after its reference columns are displayed, you can have calculated columns that are displayed between data columns as necessary. Using the example above, after the **Sum** column we could add **Column C** and **Column D** to the report and then add another calculated column, and so forth.

8. Click **OK** to exit the dialog and return to the report settings.
9. Finish setting up the report, as necessary.
10. *(Optional)* Click  in the upper right corner to display a preview of the report contents prior to saving, or click  to download the report to a spreadsheet file.
11. Click **Save** to create a new report, or to save changes to an existing report.

### Available Formulas for Calculated Columns in Reporting

The following section details the operators and functions that are available for use when creating your calculated column formulas.



**Important!** Note that the examples use "Column A", "Column B", and "Column C" to generically refer to the display names of different columns that are included in the report data.

## Operators

Operators are process or mathematical parts of expressions, such as addition and multiplication, and relationships such as greater than or less than. Use the operators below within your calculated column expressions.

Operator	Example
<b>Additive and Subtractive Operators</b>	
+ (plus, plus sign)	[Column A]+[Column B]
- (minus, dash)	[Column A]-[Column B]
<b>Multiplicative Operators</b>	
* (multiplied by, asterisk)	[Column A]*5
/ (divided by, slash)	[Column A]/[Column B]
% (mod, percent sign)	[Column A]%10
<b>Primary Operators</b>	
value (integers, text strings, dates, functions)	('this is a text string')  💡 While single quotes work for dates, we recommend wrapping dates in pound or hash signs instead to ensure consistency of data types. For example, (#2021-10-19#).
( ) (parentheses)	1000-(6*[Column A])
<b>Relational Operators</b>	
= (equals)	[Column A]=250
<> (does not equal)	[Column A]<>[Column B]
> (greater than, angle bracket)	[Column A]>250
>= (greater than or equal to)	[Column A]>=250

Operator	Example
< (less than, angle bracket)	[Column A]<500
<= (less than or equal to)	[Column A]<=100
<b>Logical Operators</b>	
or,    (double pipe)	[Column A]<[Column B]  [Column A]<500
and, &&	[Column A]<[Column B]&&[Column A]<1000

## Functions



The functions included in the calculated column formula determine in part what is returned in the column. Use the functions described below within your calculated expressions to return data within a calculated column.

For more information on the description or formatting for the calculations below, see ["Calculated Metric Expressions Reference" on page 136](#).

Function	Example Formula
Abs	Abs([Column A])
Acos	Acos([Column A])
Asin	Asin([Column A])
Atan	Atan([Column A])
Avg	Avg([Column A], [Column B], [Column C])
Ceiling	Ceiling([Column A])
Concatenate	Concatenate('text1',[Column A], 'text2', 'textN')
Contains	Contains([Column A], 'My Blue Heaven', 2, 7)
Cos	Cos([Column A])
DateAdd	DateAdd('D', 5, [Column A])
DateDiff	DateDiff('D',[Column A], [Column B])
DatePart	DatePart('M', [Column A])
Exp	Exp([Column A])
Find	Find([Column A], 'My Blue Heaven', 2, 20)

Function	Example Formula
First	First([Column A], [Column B], [Column C])
Floor	Floor([Column A])
IEEERemainder	IEEERemainder([Column A], [Column B])
If	If([Column A]>500, 'Go ahead', 'Stop')
In	In([Column A], 1, 2, 3)
Join	Join([Column A], [Column B], [Column C], ' ')
Length	Length([Column A])
Log	Log([Column A], 10)
Log10	Log10([Column A])
Lower	Lower([Column A])
LTrim	LTrim([Column A])
Max	Max([Column A], [Column B], [Column C])
Min	Min([Column A], [Column B], [Column C])
Now	Now()
Pow	Pow([Column A], 2)
Replace	Replace([Column A], 'Blue', 'red')
Round	Round([Column A], 2)
RTrim	RTrim([Column A])
Search	Search('blue', [Column A], 5, 30).
Sign	Sign([Column A])
Sin	Sin([Column A])
Sqrt	Sqrt([Column A])
SubString	SubString([Column A], 4, 10)
Sum	Sum([Column A], [Column B], [Column C])
Tan	Tan([Column A])
Trim	Trim([Column A])
Truncate	Truncate([Column A])
Upper	Upper([Column A])

**Notes:**

- To delete a calculated column from a report, click the name of the report on the **Charts & Reports** page and click  to display the report columns. Click the **Selected Columns** tab, and click  in the corresponding calculated column row to delete it. Click **OK** to close the dialog and click **Save** to save the changes to the report.

## Adding Dynamic Filters to Online Reports


Capture and filter report data using relative metric and metadata field codes to create dynamic reports that display data according to the project it is viewed within. Filtering reports based on relative metrics and metadata field codes allows you to narrow the returned data set while still generating a higher-level view. Dynamic filters allow you to view a subset of data from within different projects.


---

**Important!** Ensure the **Override project filtering** check box is selected on the report settings. This enables the report to include data across a subset of projects.

---

### To add dynamic filters to an online report:


1. [Create a new report, or open an existing report for editing.](#)
2. Click  in the upper right corner to view the report details, and click the **Selected Filters** tab.
3. To add filters, double-click or drag and drop the column names from the left side of the dialog to any area in the **Selected Filters** tab.
  - To search for a column to add as a filter, enter search criteria in the **Find** field after selecting the subject.
  - To include an entire column set, drag and drop the column set to any area in the **Selected Filters** tab.

 If multiple filters are added to the report, data must meet ALL filter criteria to be included in the report.
4. For each added filter, select the operator and filter criteria that report data must match to be included.

The filter operators are dependent on the column selected to filter by, and generally include options such as =, is empty, is one of, does not contain, and more.

The filter type must be selected from one of the following, and the following field identifies the criteria to be met:

- **Metadata** - Enter the field code display name and select from the returned list. Ensure you enter a [valid query field code](#). While some operators may work in global level reports, this filter type is designed to only work in reports pulled into project layouts via the **Report** pod (project level reports).
- **Metric** - Enter the metric display name and select from the returned list. While some operators may work in global level reports, this filter type is designed to only work in reports pulled into project layouts via the **Report** pod (project level reports).
- **Text** - Enter or select a static string or numeric value such as a date.
- **Current User** - Filters the report to data only applicable to the user logged in and viewing the report. Current User is only available for numeric or ID data type columns.



 Type ahead to search for metrics and field codes when defining the filter criteria. Only metrics and field codes that match the data type of the filter display for selection. For example, if you select a date filter, you can only select date metrics or field codes to define the relative filter.

For example, to create a report that returns a list of deactivated users, filter on the User Active column to return only users where the active flag is set to **No**. To set up this filter, the operator selected is **=**, the type selected is **Text**, and the criteria is **No**.



Selected Columns
Selected Filters
Advanced Matrix Settings

Project ID  Runtime Filter 

= Text No

5. *(Optional)* Select the **Runtime Filter** check box to determine what filters are available for users to apply when refreshing the data in the report.
6. Click **OK** to exit the dialog and return to the report settings.
7. Finish setting up the report, as necessary.
8. *(Optional)* Click  in the upper right corner to display a preview of the report contents prior to saving, or click  to download the report to a spreadsheet file.
9. Click **Save** to create a new report, or to save changes to an existing report.

**Notes:**

- To delete a filter from a report, click the name of the report on the **Charts & Reports** page and click  to display the report columns. Click the **Selected Filters** tab, and click  in the corresponding filter row to delete it. Click **OK** to

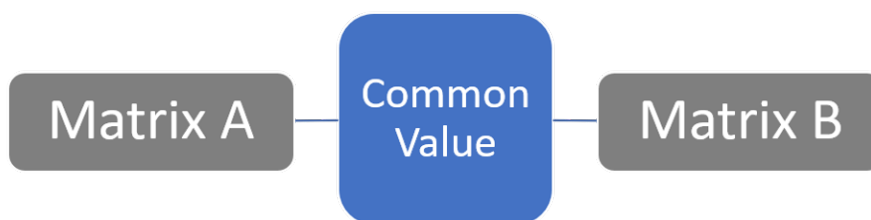
close the dialog and click **Save** to save the changes to the report.

- Filter icon will not appear if there are no filters available for users to apply.
- Long string and multi-select list metrics are currently not supported for use as metric filters.

## Adding Multiple Matrices to Online Reports

Reporting details can be contained in multiple sources within Accolade. To consolidate data into a single source to be used for reporting or the creation of charts or presentations, users can create reports to combine the data. Information from more than one project matrix can be pulled into a report by including a common value that is included in the sources, for example, using a Department or Region metric or a common Row ID.

In addition to selecting the matrix and metric columns to be included in the report, users must create join statements that define how the matrix information is related.



### To add multiple matrices to an Accolade online report:

1. [Create a new report or open an existing report for editing.](#)
2. On the **Selected Columns** tab, select the matrices and metrics to be included in the report.
3. On the **Advanced Matrix Settings** tab, click **+ Add** to add the matrix join statements.
4. In each side of the dialog, select one of the matrices from the drop-down list, and select an option to use as the common value to join the matrices.

The two selected matrices must be different, but the matrix/metric combination can be any combination of metrics or row IDs, as long as the selected metrics share a common value and are of the same data type.

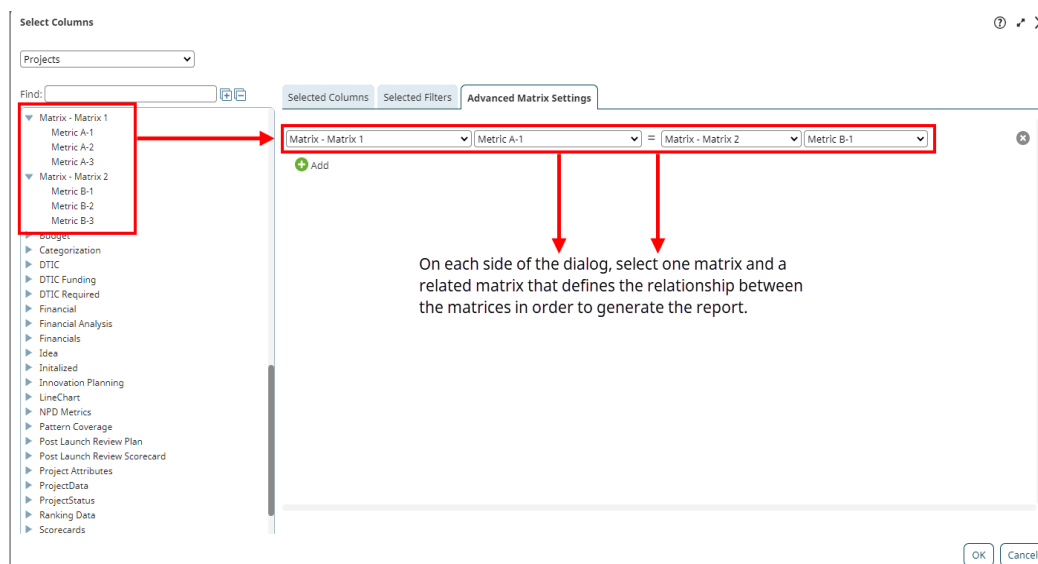
Selecting a metric will define it as the common value between the two matrices. Note that it can be the same metric if it is used in both matrices, or it can be different metrics that will have the same value in both matrices. In addition, a metric used as a common value does not need to be added as a reporting column in order to be used to create the join statement.

Selecting Row ID will compare matrices by rows, for example Row 1 in Matrix A will be compared with Row 1 in Matrix B, and so on. This can be used when there are no



additional common values in the two matrices, and the matrices have a direct line-by-line comparison.



**Caution!** Selecting Row ID as a common value can cause inconsistencies in reporting. Since assigned Row IDs are not visible within a matrix, report results can be incorrect if rows have been deleted from a matrix or if there is a mismatch.



5. Repeat steps 3-4 to add additional matrix join statements as necessary.
 

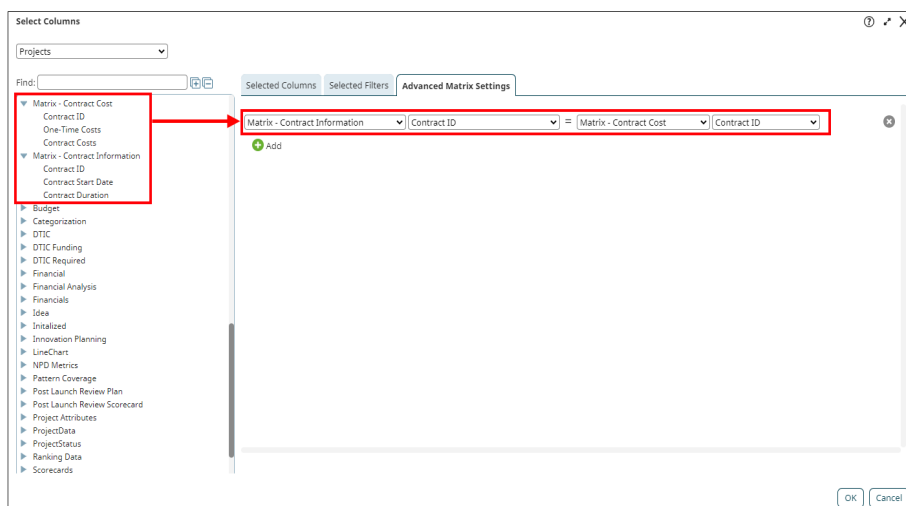
All included matrices must have at least one related join statement, but a matrix can be referenced in more than one statement. For example, if you choose to include metrics from Matrix A, Matrix B, and Matrix C, you would need to create two statements to join the information. You could create a statement that relates A to B, and one that relates B to C, or you could have a statement that relates A to B, and one that relates A to C.
6. Click **OK** to exit the dialog and return to the report settings.
7. Finish setting up the report, as necessary.
8. (Optional) Click  in the upper right corner to display a preview of the report contents prior to saving, or click  to download the report to a spreadsheet file.
9. Click **Save** to create a new report, or to save changes to an existing report.

**Note:** [EMPTY] or blank cells in your report may indicate a mismatch in the common value linking the matrices. If the project value referenced in the join statement is not defined in one of the matrices, for example if there is not a matching value in both matrices, or a matrix contains empty rows, the report will return partial or full rows that contain [EMPTY] values.

**EXAMPLE** Example

For example, a user has two different matrices that contain information related to vendor contracts for their projects, and needs to create a report containing relevant information from both matrices. They have a matrix named **Contract Information**, which contains the start date and duration of the specific contracts, and a second matrix named **Contract Cost**, which contains the costs related to the specific contracts.

To pull this information into one report, the user has added the related columns to the **Columns** tab, and created a join statement in the **Advanced Matrix Settings** tab that links the two matrices using the **Contract ID** metric that is a member of both matrices.



Once the user enters the remaining report details and clicks **OK**, the following report is generated:

Contract Information Matrix				Contract Cost Matrix		
Project Name	Contract ID	Contract Start Date	Contract Duration	Contract ID	One-Time Costs	Contract Costs
Emotion Electronics	A100	2019-06-01	12 Month Term	A100	2100	12500
Emotion Electronics	A101	2020-06-01	12 Month Term	[EMPTY]	0	0
Emotion Electronics	[EMPTY]	1900-01-01	[EMPTY]	A110	1400	12500
Smith Marketing	28501	2019-06-01	12 Month Term	28501	8400	10125
Smith Marketing	34886	2019-06-01	12 Month Term	34886	1850	12750
Express Services	001684-0197	2019-10-21	24 Month Term	001684-0197	0	1840
ACME Company	AC1217	2018-04-01	12 Month Term	AC1217	2500	5000
ACME Company	AC1924	2019-04-01	12 Month Term	AC1924	0	5300
ACME Company	AC2101	2020-04-01	12 Month Term	AC2101	500	6150
Fred's Grocery	[EMPTY]	1900-01-01	[EMPTY]	[EMPTY]	0	0
Fred's Grocery	[EMPTY]	1900-01-01	[EMPTY]	[EMPTY]	0	0

Note the following:

The **Contract ID** field is the common identifier included in both matrices, and used to connect the relevant information.



The left three columns contain information that is from the **Contract Information** matrix in the related projects.

The right three columns contain information that is from the **Contract Cost** matrix in the related projects.



The highlighted sections below show two different scenarios that may indicate missing or incomplete data.

- Rows 2 & 3 of the report display **[EMPTY]** in some of the data cells, which indicates Contract IDs values that are not found in both matrices. In row 2, the information for contract A101 is only included in the Contract Information matrix, so the related Contract Cost matrix fields are **[EMPTY]**. In row 3, the information for contract A110 is only included in the Contract Cost matrix, so the related Contract Information matrix fields are **[EMPTY]**.
- Rows 10 & 11 display **[EMPTY]** cells in all of the data cells, which indicates that one or more of the included matrices either does not have any rows added, or contains empty rows.

**Note:** Although the **[EMPTY]** returned values are an indicator of potential issues, the mismatched values reported are dependent on the datatype. String and list metrics will display as **[EMPTY]**. As shown in the example below, a number metric will display **0**, and a date metric will represent the default **1/1/1900** date.


Contract Details						
Project Name	Contract ID	Contract Start Date	Contract Duration	Contract ID	One-Time Costs	Contract Costs
Emotion Electronics	A100	2019-06-01	12 Month Term	A100	2100	12500
Emotion Electronics	A101	2020-06-01	12 Month Term	[EMPTY]	0	0
Emotion Electronics	[EMPTY]	1900-01-01	[EMPTY]	A110	1400	12500
Smith Marketing	28501	2019-06-01	12 Month Term	28501	8400	10125
Smith Marketing	34886	2019-06-01	12 Month Term	34886	1850	12750
Express Services	001684-0197	2019-10-21	24 Month Term	001684-0197	0	1840
ACME Company	AC1217	2018-04-01	12 Month Term	AC1217	2500	5000
ACME Company	AC1924	2019-04-01	12 Month Term	AC1924	0	5300
ACME Company	AC2101	2020-04-01	12 Month Term	AC2101	500	6150
Fred's Grocery	[EMPTY]	1900-01-01	[EMPTY]	[EMPTY]	0	0
Fred's Grocery	[EMPTY]	1900-01-01	[EMPTY]	[EMPTY]	0	0

#### Notes:

- To delete a matrix join statement from a report, click the name of the report on the **Charts & Reports** page and click  to display the report columns. Click the **Advanced Matrix Settings** tab, and click  in the corresponding definition row to delete it. Click **OK** to close the dialog and click **Save** to save the changes to the report.


## Downloading and Exporting Online Report Data

Users with access to a report can download the content of a saved online report directly from Accolade. Report creators can also set a report to export to a network location on a scheduled basis. Schedule a report for repeated exports if you save archive information on your network, or to provide access to a report to someone who is not an Accolade user.

-  To download report configuration and settings for the purpose of exporting reports between Accolade instances, see ["Importing and Exporting Accolade Online Reports"](#) on page 592.

#### To download a saved online report:

1. From the **Workspace** menu, select **My Workspace > Charts & Reports**.
2. Click the name of the report you want to view.

 identifies reports created using Accolade Office Extensions. To refine the list of reports displayed, select a category from the **Category** field or use the **Search** field to search on report names and descriptions. If the **Category** field is unavailable, all reports are grouped within a single category.


3. Click  in the top right corner of the report display page.

Accolade downloads the report contents to spreadsheet file and saves it to a temporary internet files directory, using the report's system name as the file name. Save the file to a more accessible location.

4. If the document is a template, Administrators and Process Designers with the Template Access role can save the file and [add it to the Template Library](#) as a process document.

If the document is a deliverable, activity, or gate document, the assigned document owners can save a version of the file to project.

#### To schedule a report to export to a network location:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Do one of the following:
  - **To create a new report** - Click **Add New**, select **Online Report** from the drop-down list and [create a new report](#).
  - **To edit the export settings of an existing report** - Click the name of the report on the **Charts & Reports Manager** page and click  in the upper right corner of the title in the displayed report.
3. In the **Export Days** field and the **Export Time** field, select the days of the week on which Accolade should export and enter the time the export should take place.

You must select at least one day to schedule the export. The export takes place based on the Accolade server's time, not your local time settings. If the Accolade server is located in a different time zone, ensure you are scheduling the time accurately for the export.

4. Complete the following to identify the export location and report name:

Field	Description
<b>Export File Path</b>	Enter the directory location where the exported file is saved.  The Accolade timed task service must have access to the network drive. Work with your system administrators to understand what network shares are available for use.
<b>Filename</b>	Enter the file name for the report. To append a timestamp to the file name, select the <b>Include timestamp</b> check box.  Timestamps can be helpful to identify exactly when a report was exported and saved to the network directory.

5. In the **File Type** field, select whether to download the file as a spreadsheet file, or as a file with a .csv extension which can be opened in other spreadsheet programs.

If you select to download to CSV and have text set in the **Report Privacy Warning Text** system parameter, the text is not included in the CSV file.

6. Click **Save** to save the report and the export settings.

**Notes:**

- The Timed Task Service must be enabled and running on the Accolade server for a scheduled export to save successfully. Contact your Accolade system administrator to ensure the service is running.
- If a scheduled export fails to save, the report creator receives a notification email about the failure.
- The colors defined in the **Excel Header Background Color**, **Excel Header Font Color**, and **Excel Header Is Bold** system parameters determine the formatting of the header rows within the spreadsheet file.

## Adding Accolade Online Reporting Content to Templates

Add the content of a report created within Accolade to an existing document or template using a specific named range. When downloading the report, template, or a document version with the report content, the up-to-date Accolade data is included in the file.



A spreadsheet template containing content created within Accolade can also be used as the template for a deliverable or activity. Administrators and Process Designers with the Template Access role can save the file and [add it to the Template Library](#) as a Process Document type template instead of as a Report type.

**To add content from an online report to an existing spreadsheet file:**

1. Note the system name of the report in Accolade.
2. Select the cell within the spreadsheet where the report content should begin.

When the file is downloaded from Accolade, the report contents start at the cell with the named range, and expands to the right and below for the required number of columns and rows to accommodate the data.

---

**Important!** Any information in cells to the right of the one with named range could be deleted based on the report's content. Any information below the cell with the named range is pushed to below the report's content.

---

3. In the **Name** field for the cell, enter **SGM\_RG\_<RGReportName>** and press **Enter**.



For example, to include a report with the system name **ModelsInUse**, enter **SGM\_RG\_ModelsInUse** as the cell name.


**Notes:**

- Using this function to associate a spreadsheet workbook with report content to a project does not display project level data.

## Creating Charts from Report Data Overview

Online reports created within Accolade can be used to create new or copy existing charts that represent all or a portion of the data that is returned in the report. Charting options vary, and a wide variety of charts are included so you can create the best visual representation of the data in your system as possible.

### Creating Bar Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Bar charts use bars to represent and compare categories of data in a format that can be displayed horizontally or vertically. One axis will generally have numerical values, and the other will describe the types of categories being compared. In bar charts, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for

sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

---

**Important!** Select appropriate data types to render a meaningful chart. Numeric data types will chart bars successfully. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



---

#### To create a bar chart based on report data:


1. From the **Workspace** menu, select **Charts & Reports**.



To narrow the list, search by the chart name or category.

**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Bar Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the chart.   To display this name as the chart's title, select the <b>Display as title</b> option.
<b>System Name</b>	Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.
<b>Category</b>	Enter or select the group to which this chart belongs.

Field	Description
	<p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart. This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.</p>


4. *(All optional, available in configuration only)* Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	Select this check box to make the chart publicly available for users to access and view the chart.  Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.
<b>Available to Configuration</b>	Select this check box to make the chart available for use in configuration.
<b>Specific Roles</b>	Select the system user roles that have access to view the chart.  Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.
<b>Configuration Access Groups</b>	When either <b>Available to</b> check box is checked, access groups must be defined for the chart.  The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.
<b>Process Model Usage</b>	<i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.  The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.


**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Grouping** field, select the column from the report that represents the data and measurement values to plot on the chart.

- *(Optional)* To use the column names as labels for each axis, select the **Display Axis Label** option for one or both axes.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values for the selected grouping display.
7. In the **Bar** field, select the column from the report that represents the data and measurement values to plot on the chart.
    - The chart draws negative and positive data points as greater than or less than a zero-value line. If charting only positive values, the chart draws bars as greater than zero.
    - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
    - *(Optional)* To use the column names as labels for each axis, select the **Display Axis Label** option for one or both axes.
    - *(Optional)* To display grid lines for the vertical axis, select the **Show Grid Lines** option.
    - *(Optional)* To display values on the bars in the chart, select **Display totals**.
    - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values for the bars display.
  8. In the **Cycles** field, select one or many cycles. Each cycle displays a different grouping of data that the bars represent. The Grouping selection is automatically selected and cannot be unselected.
  9. Enter the following information to alter the chart display:

Field	Description
<b>Display Type</b>	<p>Select whether the bars display horizontally or vertically. The chart rotates according to the display type. Number formats specified in the report will also rotate since they apply to the data and not the axis.</p> <p> If the contents of your report produces enough bars that the labels along the horizontal axis overlap, select the <b>Rotate Horizontal Axis Text</b> option to display the labels at an angle instead of horizontally to prevent overlapping.</p>
<b>Color Theme</b>	<p>Select the color palette to assign to the bars.</p> <p>If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20-25 plotted values.</p>




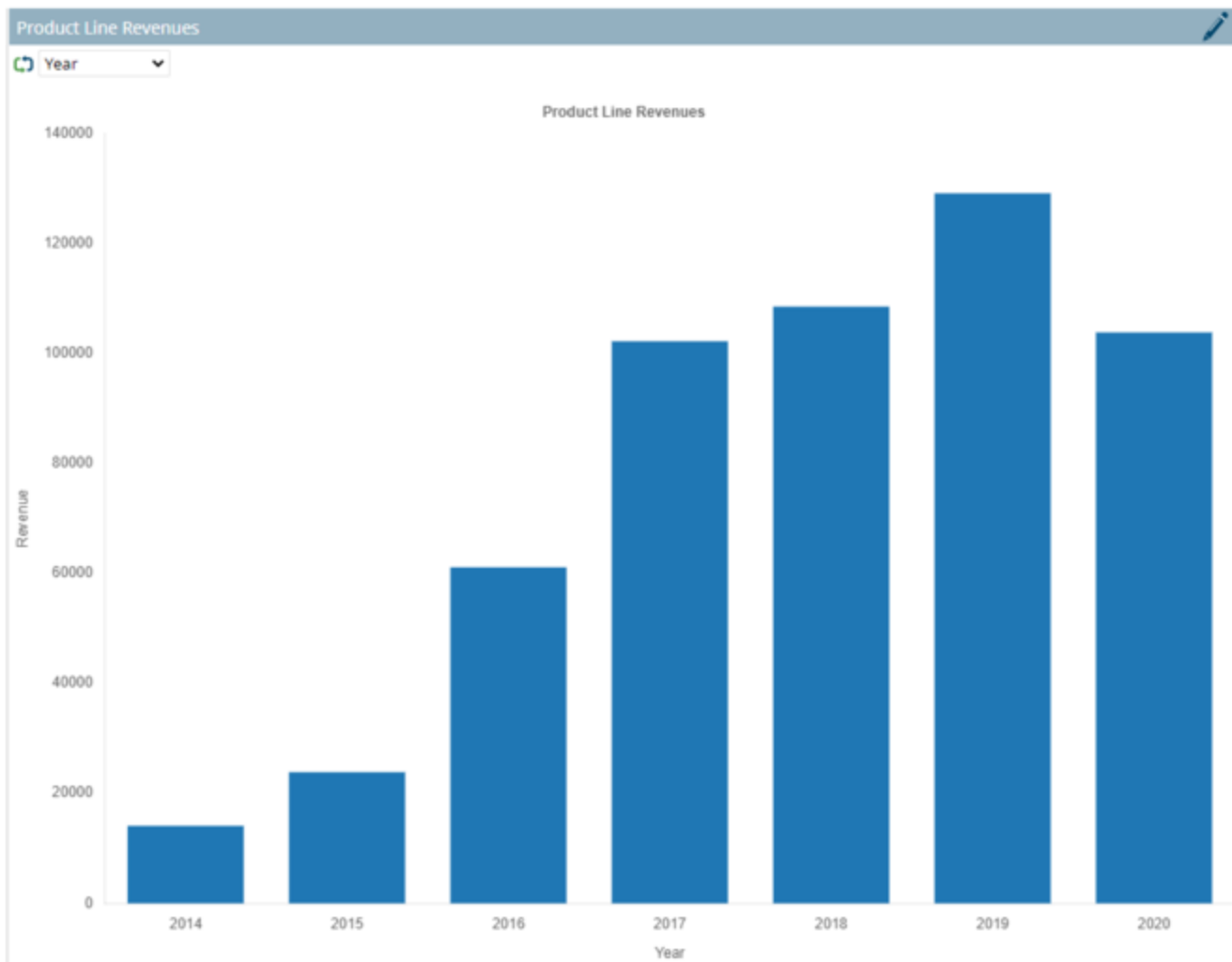
10. (Optional) Add [target lines](#) to display on the chart.
11. (Optional) If you edited an existing chart, click  in the upper right corner to view the new chart.
12. Click **Save** to save your changes and create the chart.


### Example - Creating Bar Charts in Accolade

For example, a user wants to review and compare the revenue by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Revenue**, **Region**, and **Year** metrics to be included in the report.

To create a bar chart to display this information, the user has selected the **Year** for the **Grouping** value and the **Revenue** as the **Bar** value. The bars represent the yearly sales values of various products.


To create a bar chart to display this information and cycle through the metrics for different chart views, the user has selected the **Year** for the **Grouping**, the **Revenue** for the **Bar**, and the **Product Lines**, **Revenue**, and **Region** as the **Cycles** values. The Product Lines in the report represent the business units of Desktop, Tablets, Peripherals, Servers, and Mobile. The bars represent the yearly sales values of the various products. Select the cycle icon  to view the different charts.

**Notes:**

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Before creating the chart, the user selects the sort order of the data in the associated report.

- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

## Creating Grouped Bar Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Grouped bar charts use bars to represent and compare different categories of two or more sets of data in a format that display horizontally or vertically. Because the categories are grouped and arranged side by side, the grouped bar arrangement allows users to visually represent the differences inside a group. The grouped bar chart can be used to showcase differences in the same category across groups. Generally, in the chart, one axis has a value such as a product line, the other axis has numerical values such as revenue, and the bar segments show categories to be compared. In grouped bar charts, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select appropriate data types to render a meaningful chart. Numeric data types will chart bars successfully. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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### To create a grouped bar chart based on report data:

1. From the **Workspace** menu, select **Charts & Reports**.



To narrow the list, search by the chart name or category.


**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Grouped Bar Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.

## 3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	<p>Enter a name, up to 64 characters long, which identifies the chart.</p> <p> To display this name as the chart's title, select the <b>Display as title</b> option.</p>
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you</li> </ul>

Field	Description
	<p>are assigning a user, however depending on the project configuration, you can assign any user.</p> <ul style="list-style-type: none"> <li>Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.</p>

4. *(All optional, available in configuration only)* Enter the following information to make the chart publicly available.


Field	Description
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the chart publicly available for users to access and view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	<p>Select this check box to make the chart available for use in configuration.</p>
<b>Specific Roles</b>	<p>Select the system user roles that have access to view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is checked, access groups must be defined for the chart.</p>

Field	Description
	The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.
<b>Process Model Usage</b>	<p><i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.</p> <p>The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.</p>


**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Horizontal Axis** field, select the column from the report that represents the data and measurement values to plot on the chart.
  - The chart draws negative and positive data points as greater than or less than a zero-value line. If charting only positive values, the chart draws bars as greater than zero.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
  - *(Optional)* To use the column name as a label for the axis, select the **Display axis label** option.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values for the selected column display.
7. *(Optional)* In the **Vertical Axis** field, select the column from the report that represents the data and measurement values to plot on the chart.
  - The chart draws negative and positive data points as greater than or less than a zero-value line. If charting only positive values, the chart draws bars as greater than zero.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.

- (Optional) To use the column name as a label for the axis, select the **Display axis label** option.
  - (Optional) In the **Number Format** drop-down, select an option to indicate how values for the selected column display.
  - The **Bars** field displays a drop-down list to select one column.
8. In the **Bars** field, the user can select one or more columns from the report that represent each bar within a group.
- If the user selected a **Vertical Axis**, then the user must select one column only from the **Column** drop-down list. The chart renders by rows.
  - If the user did not select a **Vertical Axis**, then the user can select multiple columns from the box. The chart renders by columns.
9. Enter the following information to alter the chart display:


Field	Description
<b>Bar Axis Units</b>	Enter text to display as the vertical axis label.
<b>Cycle Segments</b>	<b>Horizontal Axis</b> and <b>Bars</b> determines how the cycles are mapped on the chart. <b>Horizontal Axis</b> uses the selected cycle as the basis for the horizontal axis. <b>Bars</b> maps the selected cycle to the vertical bars.
<b>Cycles</b>	Select one or many cycles.  Each cycle displays a different column of data that the grouped bars represent. The Horizontal Axis selection is automatically selected and cannot be unselected.
<b>Display Type</b>	Select whether the bars display horizontally or vertically. The chart rotates according to the display type. Number formats specified in the report will also rotate since they apply to the data and not the axis.   If the contents of your report produces enough bars that the horizontal axis labels overlap, select the <b>Rotate Horizontal Axis Text</b> option to display the labels at an angle instead of horizontally to prevent overlapping.
<b>Number Format</b>	Select a number formatting option to indicate how values within the chart are displayed.
<b>Legend</b>	Select where in the chart to display the key that identifies what the colors in the chart represent.  After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.

Field	Description
<b>Color Theme</b>	Select the color palette to assign to the bars. If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20-25 plotted values.

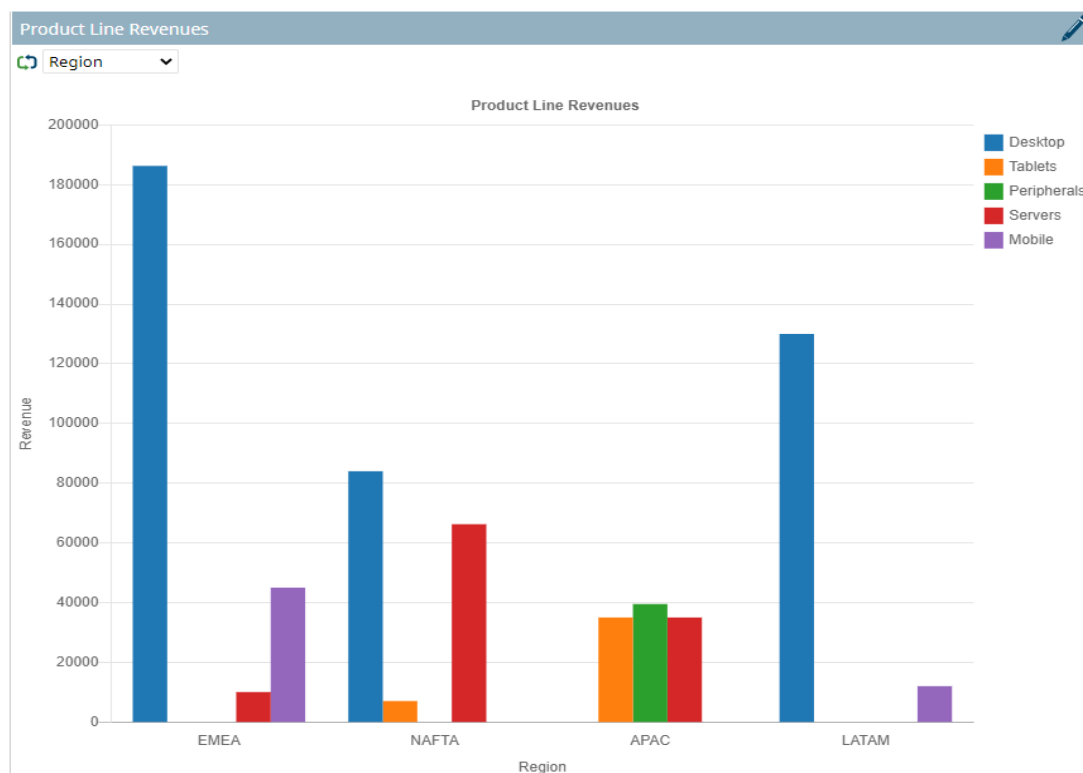
10. (Optional) Add **target lines** to display on the chart.
11. (Optional) If you edited an existing chart, click  in the upper right corner to view the new chart.
12. Click **Save** to save your changes and create the chart.


### Example - Creating Grouped Bar Charts in Accolade

For example, a user wants to review and compare the revenue by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Region**, **Year**, and **Revenue** metrics to be included in the report.

To create a grouped bar chart to display this information, the user has selected the **Region** for the **Horizontal Axis**, the **Revenue** for the **Vertical Axis**, the **Product Lines** as the **Bars** value, and **Product Lines**, **Revenue**, and **Year** as the **Cycles** values. The Product Lines in the report represent the business units of Desktop, Mobile, Peripherals, Servers, and Tablets. The bars represent the sales values of various products. Select the cycle icon  to view the different charts. Toggle a key label in the legend to hide and show data in the rendered chart.




**Notes:**

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Before creating the chart, the user selects the sort order of the data in the associated report.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

**Creating Stacked Bar Charts Based on Report Data**

Users can create charts to visually represent the data within Accolade. Stacked bar charts use a single bar to represent multiple categories of data in a format that display horizontally or

vertically. Because the categories are arranged in a stack, the stacked bar arrangement allows users to visually represent and compare total sizes of bars and relative differences in categories. The stacked bar chart can be used to showcase when one category overtakes another. Generally, in the chart, one axis has a value such as a product line, the other axis has numerical values such as revenue, and the bar segments show categories to be compared. In stacked bar charts, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select appropriate data types to render a meaningful chart. Numeric data types will chart bars successfully. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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**To create a stacked bar chart based on report data:**


1. From the **Workspace** menu, select **Charts & Reports**.



To narrow the list, search by the chart name or category.


**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Stacked Bar Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the chart.   To display this name as the chart's title, select

Field	Description
	 the <b>Display as title</b> option.
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is</li> </ul>

Field	Description
	<p>assigned.</p> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.</p>

4. (All optional, available in configuration only) Enter the following information to make the chart publicly available.


Field	Description
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the chart publicly available for users to access and view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	<p>Select this check box to make the chart available for use in configuration.</p>
<b>Specific Roles</b>	<p>Select the system user roles that have access to view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is checked, access groups must be defined for the chart.</p> <p>The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.</p>
<b>Process Model Usage</b>	<p>(Available for existing charts) Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.</p>

Field	Description
	The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.


**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Horizontal Axis** field, select the column from the report that represents the data and measurement values to plot on the chart.
  - The chart draws negative and positive data points as greater than or less than a zero-value line. If charting only positive values, the chart draws bars as greater than zero.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
  - *(Optional)* To use the column name as a label for the axis, select the **Display axis label** option.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values for the selected column display.
7. *(Optional)* In the **Vertical Axis** field, select the column from the report that represents the data and measurement values to plot on the chart.
  - The chart draws negative and positive data points as greater than or less than a zero-value line. If charting only positive values, the chart draws bars as greater than zero.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
  - *(Optional)* To use the column name as a label for the axis, select the **Display axis label** option.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values for the selected column display.
  - The **Bar Segments** field displays a drop-down list to select one column.
8. In the **Bar Segments** field, the user can select one or more columns from the report that correlate to the stacked sections of the bars.

- If the user selected a **Vertical Axis**, then the user must select one column only from the **Column** drop-down list. The chart renders by rows.
  - If the user did not select a **Vertical Axis**, then the user can select multiple columns from the box. The chart renders by columns.
  - Check one or both check boxes to display values.
    - Select **Stacked to 100%** to display the bar segments as percentages of the whole rather than integer values.
    - Select **Display totals** to include the total value for the entire bar after the last segment.
9. Enter the following information to alter the chart display:

Field	Description
<b>Bar Axis Units</b>	Enter text to display as the vertical axis label.
<b>Cycle Segments</b>	<p><b>Horizontal Axis</b> and <b>Bars</b> determines how the cycles are mapped on the chart.</p> <p><b>Horizontal Axis</b> uses the selected cycle as the basis for the horizontal axis. <b>Bars</b> maps the selected cycle to the bar segments.</p>
<b>Cycles</b>	<p>Select one or many cycles.</p> <p>Each cycle displays a different segment of data that the stacked bars represent. The Horizontal Axis selection is automatically selected and cannot be unselected.</p>
<b>Display Type</b>	<p>Select whether the bars display horizontally or vertically. The chart rotates according to the display type. Number formats specified in the report will also rotate since they apply to the data and not the axis.</p> <p> If the contents of your report produce enough bars that the horizontal axis labels overlap, select the <b>Rotate Horizontal Text</b> option to display the labels at an angle instead of horizontally to prevent overlapping.</p>
<b>Number Format</b>	Select a number formatting option to indicate how values within the chart are displayed.
<b>Legend</b>	<p>Select where in the chart to display the key that identifies what the colors in the chart represent.</p> <p>After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.</p>
<b>Color Theme</b>	Select the color palette to assign to the bars.


Field	Description
	If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20-25 plotted values.

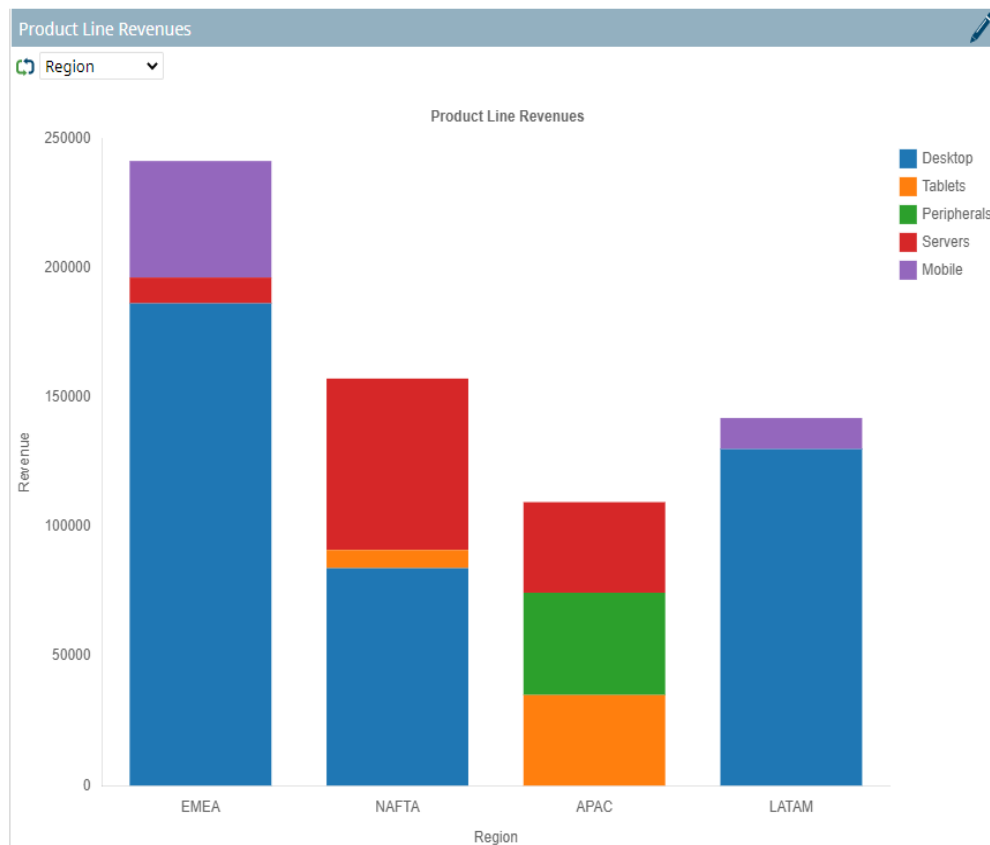
10. (Optional) Add **target lines** to display on the chart.
11. (Optional) If you edited an existing chart, click  in the upper right corner to view the new chart.
12. Click **Save** to save your changes and create the chart.


**Example - Creating Stacked Bar Charts in Accolade**

For example, a user wants to review and compare the revenue by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Region**, **Year**, and **Revenue** metrics to be included in the report.

To create a stacked bar chart to display this information and cycle through the metrics for different chart views, the user has selected the **Region** for the **Horizontal Axis**, the **Revenue** for the **Vertical Axis**, the **Product Lines** as the **Bar Segments** value, and **Product Lines**, **Revenue**, and **Year** as the **Cycles** values. The Product Lines in the report represent the business units of Desktop, Tablets, Peripherals, Servers, and Mobile. The bar segments represent the various products by category across region and revenue over several years.


Select the cycle icon  to view the different charts. Toggle a key label in the legend to hide and show data in the rendered chart.

**Notes:**

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Before creating the chart, the user selects the sort order of the data in the associated report.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

**Creating Bubble Charts Based on Report Data**



Users can create charts to visually represent the data within Accolade. Bubble charts (also known as bubble plots) are multi-dimensional graphs that are a cross between a scatter plot and a proportional area chart, and can be useful for comparing the relationships between projects in multiple dimensions. Data points are plotted against a horizontal and vertical axis, and then have additional data values represented by the size and color of the bubble. In bubble charts, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select numeric data types for **Bubble Represents** values to render a meaningful chart. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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#### To create a bubble chart based on report data:


1. From the **Workspace** menu, select **Charts & Reports**.


To narrow the list, search by the chart name or category.


**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Bubble Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the chart.   To display this name as the chart's title, select the <b>Display as title</b> option.

Field	Description
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul>

Field	Description
	 An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.

4. *(All optional, available in configuration only)* Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	Select this check box to make the chart publicly available for users to access and view the chart. Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.
<b>Available to Configuration</b>	Select this check box to make the chart available for use in configuration.
<b>Specific Roles</b>	Select the system user roles that have access to view the chart. Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.
<b>Configuration Access Groups</b>	When either <b>Available to</b> check box is checked, access groups must be defined for the chart. The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.
<b>Process Model Usage</b>	<i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.


Field	Description
	The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.

**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Horizontal Axis** and **Vertical Axis** fields, select the columns from the report that represent the data and measurement values to plot on the chart.
  - *(Optional)* To use the column names as labels for each axis, select the **Display Axis Label** option for one or both axes.
  - *(Optional)* To display grid lines for the horizontal and vertical axis, select the **Show Grid Lines** option.
  - *(Optional)* Select the **Rotate Horizontal Axis Text** option to display the labels at an angle instead of horizontally to prevent overlapping.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values on the axis are displayed.
  - *(Optional)* In **Scale Control**, change the scaling and size of the displayed chart by selecting one of the following options:
    - Select **Automatic** to set the chart range minimum and maximum values displayed in the chart based on the data ranges in the report.
    - Select **Custom** to manually set the chart **Range Minimum** and **Range Maximum** values displayed in the chart.
7. Select the following information to define what the bubbles within the chart represent:

Field	Description
<b>Bubble Size</b>	Select a number metric from the report that determines the size of each bubble in the chart.
<b>Number Format</b>	Select how values display within the tooltip for the bubbles in the chart.
<b>Bubble Represents</b>	Select the information that displays within the tooltip for the bubbles in the chart.  Selecting <b>[None]</b> displays only the bubble's value in the tooltip.

Field	Description
<b>Bubble Color</b>	Select the column that determines what each color represents in the chart.
<b>Bubble Opacity</b>	Select how solid to display the bubbles in the chart. Using a smaller value displays the bubbles less opaque, and can make each easier to see if bubbles overlap in the chart.
<b>Cycles</b>	Select one or many cycles. Each cycle displays a different grouping of data that the bubbles represent.  The Bubble Color selection is automatically selected and cannot be unselected.
<b>Color Theme</b>	Select the color palette to assign to the bubbles in the chart.
<b>Legend</b>	Select where in the chart to display the key that identifies what the bubble colors in the chart represent.  After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.


8. *(Optional)* If you edited an existing chart, click  in the upper right corner to view the new chart.
9. Click **Save** to save your changes and create the chart.

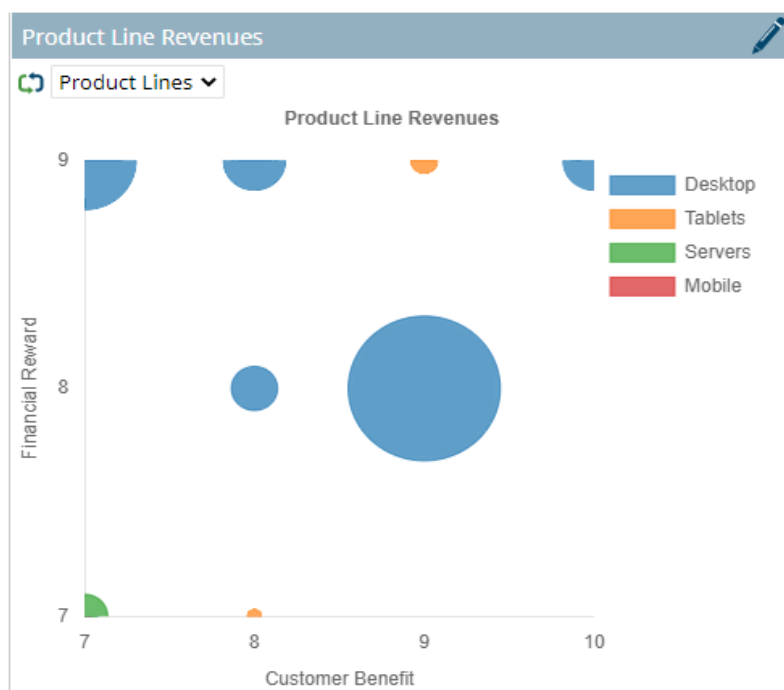
### Example - Creating Bubble Charts in Accolade

For example, a user wants to review and compare the financial reward and customer benefit by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Region**, **Revenue**, **Year**, **Financial Reward**, and **Customer Benefit** metrics to be included in the report.


To create a bubble chart to display this information and cycle through the metrics for different chart views, the user has selected:

- **Horizontal Axis** - Customer Benefit
- **Vertical Axis** - Financial Reward
- **Bubble Size** - Revenue
- **Bubble Represents** - Region
- **Bubble Color** - Product Lines
- **Cycles** - Year and Region

The Product Lines in the report represent the business units of Desktop, Tablets, Peripherals, Servers, and Mobile. The bubbles represent the various products by category across region and revenue over several years. The bubble location on the chart shows the high customer benefit and financial reward in the upper right corner and low values in the lower left corner to help you identify possible investments. Select the cycle icon  to view the different charts. Toggle a key label in the legend to hide and show data in the rendered chart.



#### Notes:

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

### Creating Line Chart by Columns Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Line Chart by Columns charts are created by connecting a series of data points together with a solid line, and can be used to display or analyze trends or patterns in data.

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select appropriate data types to render a meaningful chart. Numeric data types will chart lines successfully. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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### To create a line chart by columns chart based on report data:


1. From the **Workspace** menu, select **Charts & Reports**.



To narrow the list, search by the chart name or category.

**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.


2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Line Chart by Columns  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the chart.   To display this name as the chart's title, select the <b>Display as title</b> option.
<b>System Name</b>	Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.

Field	Description
	The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart. This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who</p>




Field	Description
	 has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.


4. *(All optional, available in configuration only)* Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the chart publicly available for users to access and view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	Select this check box to make the chart available for use in configuration.
<b>Specific Roles</b>	<p>Select the system user roles that have access to view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is checked, access groups must be defined for the chart.</p> <p>The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.</p>
<b>Process Model Usage</b>	<p><i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.</p> <p>The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.</p>

**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Line Represents** and **Columns** fields, select the columns from the report that represent the data and measurement values to plot on the chart.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
  - *(Optional)* Enter the **Vertical Axis Label** or **Horizontal Axis Label** option to display labels for one or both axes.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values on the axes are displayed.
  - *(Optional)* Select the **Show Grid Lines** option to display grid lines for one or both axes.
  - *(Optional)* To display the grid points, select the **Display Point Marker** check box.
7. Enter the following information to alter the chart display:

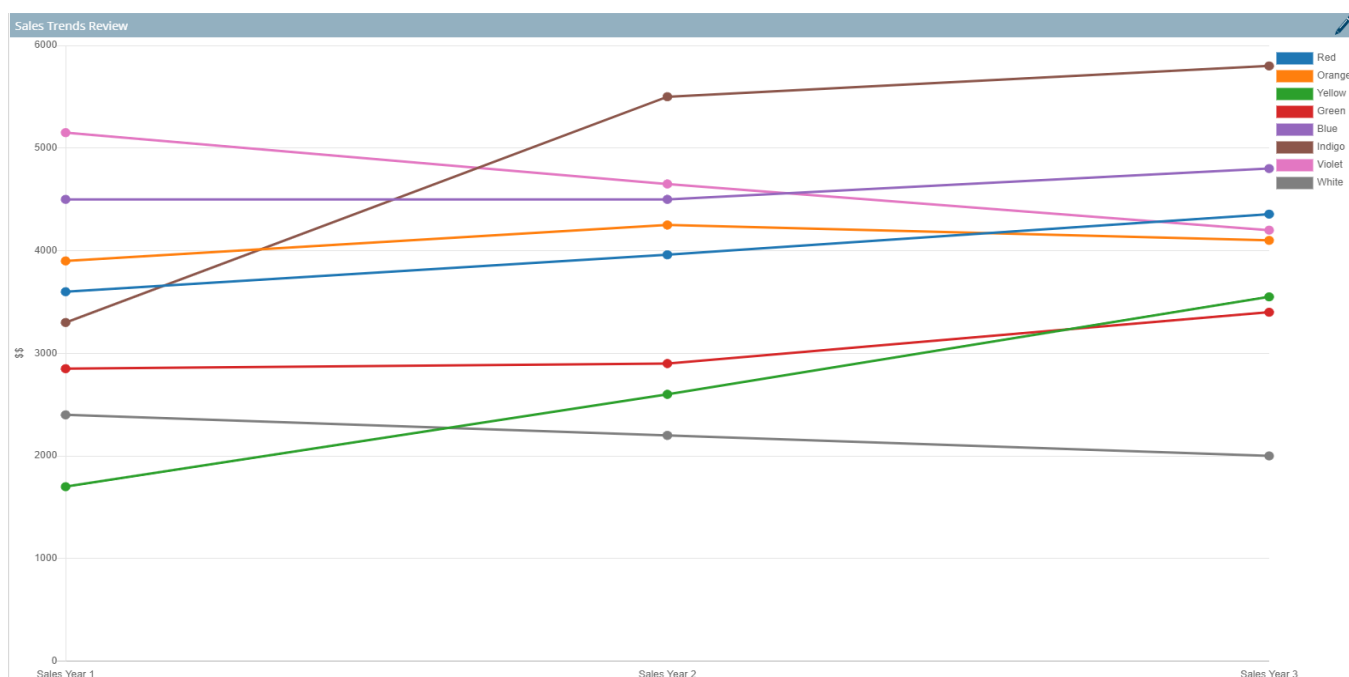
Field	Description
<b>Style</b>	<p>Select whether to display lines only, or lines with fill below.</p> <p> If the contents of your report produces enough lines that the labels along the horizontal axis overlap, select the <b>Rotate Horizontal Axis Text</b> option to display the labels at an angle instead of horizontally to prevent overlapping.</p>
<b>Legend</b>	<p>Select where in the chart to display the key that identifies what the colors in the chart represent.</p> <p>After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.</p>
<b>Color Theme</b>	<p>Select the color palette to assign to the bars.</p> <p>If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20 plotted values.</p>

8. (Optional) If you edited an existing chart, click  in the upper right corner to view the new chart.
9. Click **Save** to save your changes and create the chart.


### Example - Creating Line Chart by Columns Charts in Accolade

For example, a user wants to review and compare the past 3 years of sales numbers for several projects. The user has created a Sales Performance report for their chart report source, and selected the **Project Name** and **Sales Year 1 - Year 3** metrics to be included in the report.

To create a line chart by columns chart to display this information, the user has selected **Project Name** as the **Line Represents** value, and the **Sales Year 1 - Year 3** metrics as the **Columns** values, to create lines that represent the comparative sales trends for each year by project. Toggle a key label in the legend to hide and show data in the rendered chart.




#### Notes:

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.

- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

## Creating Line Chart Trends Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Line Chart Trends charts are created by connecting a series of data points together with a solid line, and layering multiple lines within one chart to display or analyze trends or patterns in several related sets of data. In line chart trends, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .



Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select appropriate data types to render a meaningful chart. Numeric data types will chart lines successfully. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.


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### To create a line chart trends chart based on report data:

1. From the **Workspace** menu, select **Charts & Reports**.  
To narrow the list, search by the chart name or category.  
  
**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.
2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Line Chart Trends  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	<p>Enter a name, up to 64 characters long, which identifies the chart.</p> <p> To display this name as the chart's title, select the <b>Display as title</b> option.</p>
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box</li> </ul>

Field	Description
	<p>displays or hides the additional filter options.</p> <ul style="list-style-type: none"> <li>Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.</p>


4. (All optional, available in configuration only) Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the chart publicly available for users to access and view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	<p>Select this check box to make the chart available for use in configuration.</p>
<b>Specific Roles</b>	<p>Select the system user roles that have access to view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is checked, access groups must be defined for the chart.</p> <p>The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.</p>

Field	Description
<b>Process Model Usage</b>	<p><i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.</p> <p>The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.</p>

**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Horizontal Axis** section, make the following selections:
  - *(Optional)* Enter a description in the **Label** field to display a label for the horizontal axis.
  - *(Optional)* Select the **Rotate Horizontal Axis Text** option to display the labels at an angle instead of horizontally to prevent overlapping.
  - *(Optional)* Select the **Show Grid Lines** option to display grid lines for one or both axes.
  - *(Optional)* Select the **Start at Zero** option to display the data range along the horizontal axis in relation to 0.


 When the **Start at Zero** check box is not selected, the data range for the horizontal axis will be determined by the lowest and highest available data values.

For example, you have data points that are all between the values of 6 and 10 that are being graphed along the horizontal axis. Selecting the **Start at Zero** option will display a graph that displays the value range of 0 to 10 along the horizontal axis to show the relation of the data to the origin. If **Start at Zero** is not selected, the graph will display the value range of 6 to 10 along the horizontal axis.

- *(Optional)* In the **Number Format** drop-down, select an option to indicate how values on the axis are displayed.
- In the **Column** drop-down list, select the column from the report that represents the data and measurement values to plot on the horizontal axis of the chart.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.

7. In the **Vertical Axis** section, make the following selections:
  - *(Optional)* Enter a description in the **Label** field to display a label for the vertical axis.
  - *(Optional)* Select the **Show Grid Lines** option to display grid lines for one or both axes.
  - *(Optional)* In the **Number Format** drop-down, select an option to indicate how values on the axis are displayed.
  - Select the **Lines** columns from the report that represent the data and measurement values to plot on the vertical axis of the chart.
    - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
8. *(Optional)* In the **Group By** field, select columns from the report to apply line groupings to the data presented in the graph.
  - 💡 Adding additional **Group By** selections introduces more lines to your display which may impact chart use.
9. *(Optional)* Select the **Display Point Marker** check box to display the grid points.
10. In the **Cycles** field, select one or many cycles. Each cycle displays a different grouping of data that the lines represent. The Horizontal Axis selection is automatically selected and cannot be unselected.
11. Enter the following information to alter the chart display:


Field	Description
<b>Style</b>	Select whether to display lines only, or lines with fill below.
<b>Legend</b>	Select where in the chart to display the key that identifies what the colors in the chart represent.  After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.
<b>Color Theme</b>	Select the color palette to assign to the bars.  If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20 plotted values.

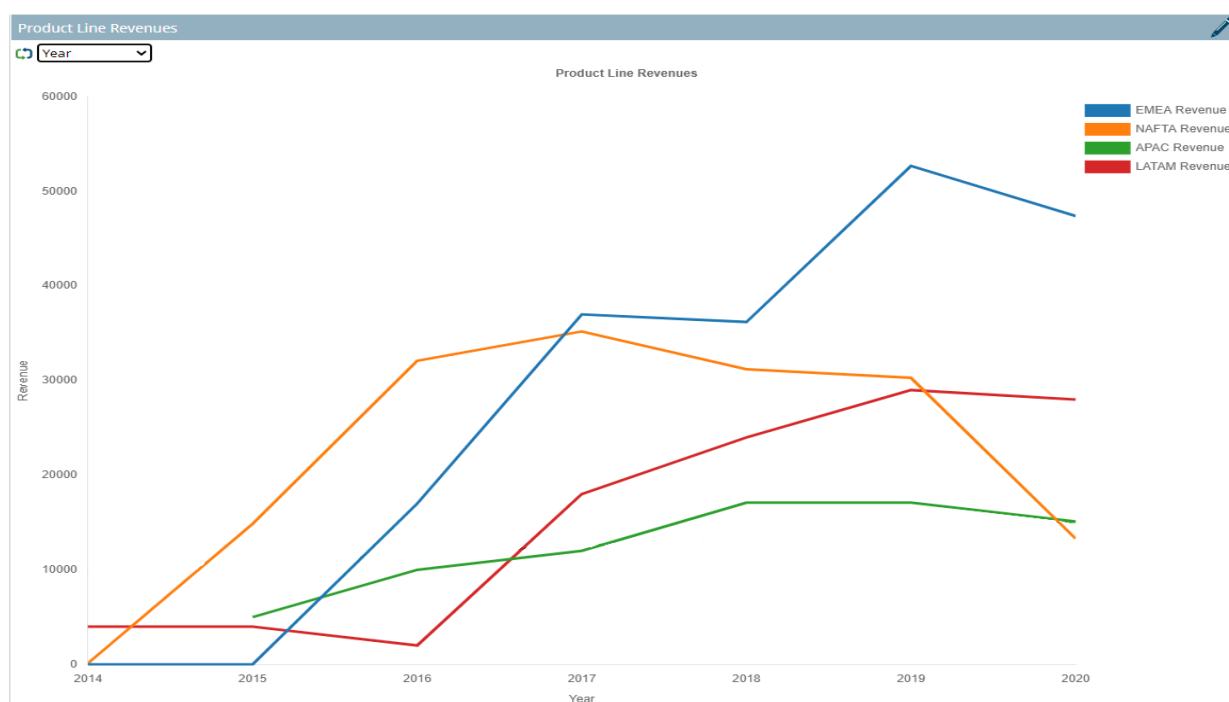
12. *(Optional)* If you edited an existing chart, click  in the upper right corner to view the new chart.
13. Click **Save** to save your changes and create the chart.




## Example - Creating Line Chart Trends Charts in Accolade

For example, a user wants to review and compare the revenue by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Region**, **Year**, and **Revenue** metrics to be included in the report.

To create a line trends chart to display this information and cycle through the metrics for different chart views, the user has selected the **Year** for the **Horizontal Axis Label**, the **Product Lines** as the **Column** value, the **Revenue** for the **Vertical Axis Label**, the **Revenue** for the **Lines**, the **Region** for the **Group By** value, and **Revenue**, **Region**, and **Year** as the **Cycles** values. The Product Lines in the report represent the business units of Desktop, Tablets, Peripherals, Servers, and Mobile. The line segments represent the various products by category across region and revenue over several years. Select the cycle icon  to view the different charts. Toggle a key label in the legend to hide and show data in the rendered chart.




### Notes:

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render

inconsistently due to empty or missing data returned by the report.

- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Use the **Currency Symbol** system parameter to specify the currency symbol that displays in the **Number Format** field when creating charts and reports.

## Creating Pie Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Pie charts present categories of data as slices of a pie, where each category is represented as a percentage of the whole value of the chart. In pie charts, the user can cycle through different views, that is, different categories of data to get a more comprehensive view of a portfolio's performance using the cycle icon .

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select numeric data types for the **Slice Represents** values to render a meaningful chart. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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### To create a pie chart based on report data:



1. From the **Workspace** menu, select **Charts & Reports**.


To narrow the list, search by the chart name or category.

**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Pie Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	<p>Enter a name, up to 64 characters long, which identifies the chart.</p> <p> To display this name as the chart's title, select the <b>Display as title</b> option.</p>
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box</li> </ul>

Field	Description
	<p>displays or hides the additional filter options.</p> <ul style="list-style-type: none"> <li>Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul> <p> An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.</p>

4. (All optional, available in configuration only) Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	<p>Select this check box to make the chart publicly available for users to access and view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.</p>
<b>Available to Configuration</b>	<p>Select this check box to make the chart available for use in configuration.</p>
<b>Specific Roles</b>	<p>Select the system user roles that have access to view the chart.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Configuration Access Groups</b>	<p>When either <b>Available to</b> check box is checked, access groups must be defined for the chart.</p> <p>The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.</p>

Field	Description
<b>Process Model Usage</b>	<p><i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.</p> <p>The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.</p>



**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.


- In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
- Select the following information to define the slices within the pie chart and how they display:

Field	Description
<b>Slice Represents</b>	Select the data column that contains the row items that the slices in the pie represent.
<b>Slice Size</b>	Select the numeric data column that determines the size of the slices in the pie.
<b>Cycles</b>	<p>Select one or many cycles.</p> <p>Each cycle is a data column that contains the row items that the slices in the pie represent. The Slice Represents selection is automatically selected and cannot be unselected.</p>
<b>Slice Name</b>	Select to include the name of the pie slice as part of the slice's label.
<b>Slice Value or Slice Percentage</b>	<p>Select whether to label the pie slices by value or percentage of the pie included in the slice.</p> <p>You can select one or both, or select neither to display the slices with no values.</p>

- Select the following attributes to define the pie chart's style:

Field	Description
<b>Doughnut</b>	Displays the pie with an empty space in the middle.


Field	Description
	
<b>Exploded</b>	Displays the pie with space between each piece. 
<b>Number Format</b>	Select a number formatting option to indicate how the values in the chart are displayed.
<b>Color Theme</b>	Select the color palette to assign to the pie sections of the chart. If plotting 10 or more data points, consider a color theme to accommodate each value measurement. Themes 2-5 allow for up to 20-25 plotted values.
<b>Legend</b>	Select where in the chart to display the key that identifies what the colors in the chart represent. After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.

8. *(Optional)* If you edited an existing chart, click  in the upper right corner to view the new chart.
9. Click **Save** to save your changes and create the chart.

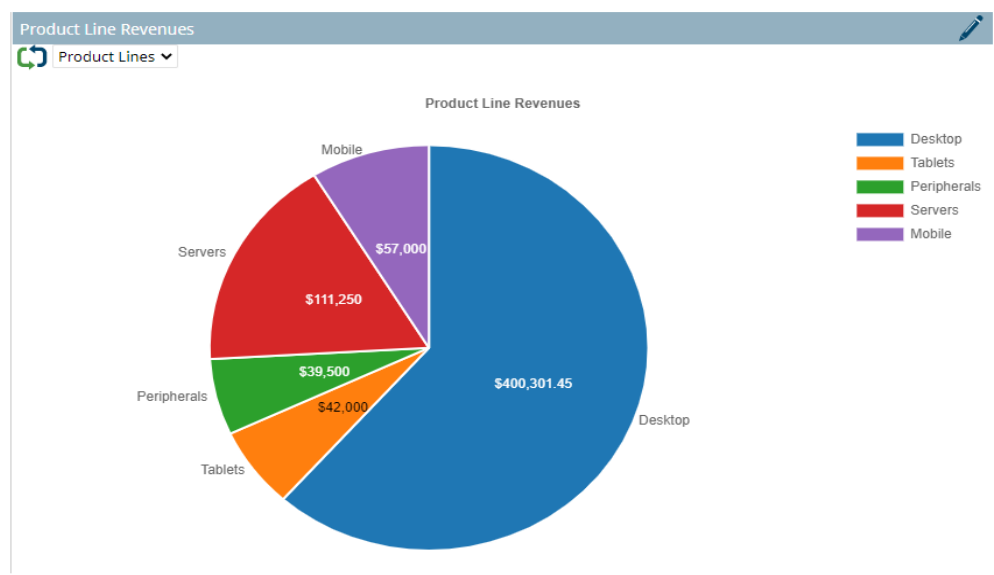
### Example - Creating Pie Charts in Accolade

For example, a user wants to review and compare the revenue by region for a portfolio of products over the last several years. The user has created a Product Line Revenues Report for their report source, and selected the **Product Lines**, **Region**, **Year**, and **Revenue** metrics to be included in the report.


For example, a user wants to review and compare last year's sales revenue numbers for several projects. The user has created a Sales Performance report for their chart report source, and selected the **Project Name** and **Sales Year 1** metrics to be included in the report.

To create a pie bar chart to display this information and cycle through the metrics for different chart views, the user has selected the **Product Lines** for the **Slice Represents**, the **Revenue** for the **Slice Size**, and the **Region, Year, and Revenue** as the **Cycles** values. The Product Lines in the report represent the business units of Desktop, Tablets, Peripherals, Servers, and Mobile. The slices represent the various products by category across region and revenue over several years. Select the cycle icon  to view the different charts. Toggle a key label in the legend to hide and show data in the rendered chart.

To create a pie chart to display this information, the user has selected **Project Name** as the **Slice Represents** value, and **Sales Year 1** as the **Slice Size** value, to create slices that represent each project's sales revenue as a portion of the company's overall sales total.



#### Notes:

- Percentages in pie charts truncate after the first decimal place therefore the total may not always equal 100%. For example, 27.786% will display as 27.7%.
- Negative values are not included in the pie chart.
- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render

inconsistently due to empty or missing data returned by the report.

- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.
- Before creating the chart, the user selects the sort order of the data in the associated report.



## Creating Radar Charts Based on Report Data

Users can create charts to visually represent the data within Accolade. Radar charts are multi-dimensional graphs that display data values based on a shared center axis, and can be useful for comparing properties of a single component, or for performance analysis and determining when one variable is performing differently than the rest.

Using Accolade online report data, users with All Reporting Rights can create charts on the **Charts & Reports** page. Administrators and Process Designers can set charts as available for sharing with other users, and can [add a chart to a pod within a layout](#) to display on a project page or as a global link.

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**Important!** Select spokes with numeric data types to render a meaningful chart. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.



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### To create a radar chart based on report data:


1. From the **Workspace** menu, select **Charts & Reports**.


To narrow the list, search by the chart name or category.


**Note:** Process Designers can also create or edit charts, reports, and related configuration by navigating to the **System** menu and selecting **Content Sources > Charts & Reports Manager**.

2. Do one of the following:
  - **To add a new chart** - Click **Add New**, select **Chart** from the drop-down list, and click the Radar Chart  icon.
  - **To edit the details of an existing report** - Click the name of the chart on the **Charts & Reports** page and click  to edit the report details. Only users assigned as chart owners and Process Designers with All Reporting Rights can edit chart details.
3. Enter the following information to identify the chart:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the chart.   To display this name as the chart's title, select the <b>Display as title</b> option.

Field	Description
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the chart in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among charts and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Category</b>	<p>Enter or select the group to which this chart belongs.</p> <p>Use categories to organize like charts together. For example, you may choose to group all the charts used in global layouts into the same category, in order to separate them from charts that are used in process model layouts or other reporting.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Description</b>	<p>Enter a description of the purpose or nature of the chart.</p> <p>This description helps other users identify the chart on the <b>Charts &amp; Reports</b> page.</p>
<b>Owners</b>	<p>Click  and select the additional users who can edit the chart details.</p> <p>To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field.</p> <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul>

Field	Description
	 An assigned owner with All Reporting Rights can view, update, delete, or add additional owners to the chart. An assigned owner who has Refresh Workbook Data rights will only be able to view the chart. To make the chart available for all users or for configuration setup, you must have a Process Designer with All Reporting Rights as an assigned owner.

4. *(All optional, available in configuration only)* Enter the following information to make the chart publicly available.

Field	Description
<b>Available to Charts &amp; Reports</b>	Select this check box to make the chart publicly available for users to access and view the chart. Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart in the <b>Shared Charts &amp; Reports</b> section on the <b>Charts &amp; Reports</b> page.
<b>Available to Configuration</b>	Select this check box to make the chart available for use in configuration.
<b>Specific Roles</b>	Select the system user roles that have access to view the chart. Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the chart on the <b>Charts &amp; Reports</b> page.
<b>Configuration Access Groups</b>	When either <b>Available to</b> check box is checked, access groups must be defined for the chart. The access groups displayed are based on the current user's access group permissions and the access groups the chart belongs to. Additionally, Process Designers with matching permissions will be able to edit and view the chart.
<b>Process Model Usage</b>	<i>(Available for existing charts)</i> Click on the <b>Process Model Usage</b> button to see a list of process models that the online chart is associated with.


Field	Description
	The list displayed includes all process models the chart is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.

**Note:** Clicking either **Available to** check box will place the chart in the **Shared Charts & Reports** section of the **Charts & Reports** page. If neither check box is selected, the chart will only be available to the assigned owners in their **My Charts & Reports** section.

5. In the **Report Source** field, select the report that contains the data to include in the chart. Only [online reports created in Accolade](#) are available for selection.
6. In the **Polygons** field, select the column from the report that represents the data and measurement values to plot on the chart.
  - If a column within the report contains a selected **Aggregate** value, the aggregation displays automatically when the report column is selected to display in a chart.
7. In the **Spokes** field, select the columns from the report that represent the data and measurement values to plot as groupings or areas of the values.
8. Enter the following information to alter the chart display:

Field	Description
<b>Scale Control</b>	Select the scaling and size of the displayed chart. <ul style="list-style-type: none"> <li>• Select <b>Automatic</b> to set the chart range minimum and maximum values displayed in the chart based on the data ranges in the report.</li> <li>• Select <b>Custom</b> to manually set the chart <b>Range Minimum</b> and <b>Range Maximum</b> values displayed in the chart.</li> </ul>
<b>Number Format</b>	Select a number formatting option to indicate how the values in the chart are displayed.
<b>Style</b>	Select how the polygon shapes charting the data display.  If you select <b>Lines and Fill</b> or <b>Fill Only</b> , select how solid to display the shapes in the chart in the <b>Polygon Opacity</b> field. Using a smaller value displays the polygons less opaque, and can make each easier to see if polygons overlap in the chart.
<b>Legend</b>	Select where in the chart to display the key that identifies what the colors in the chart represent.

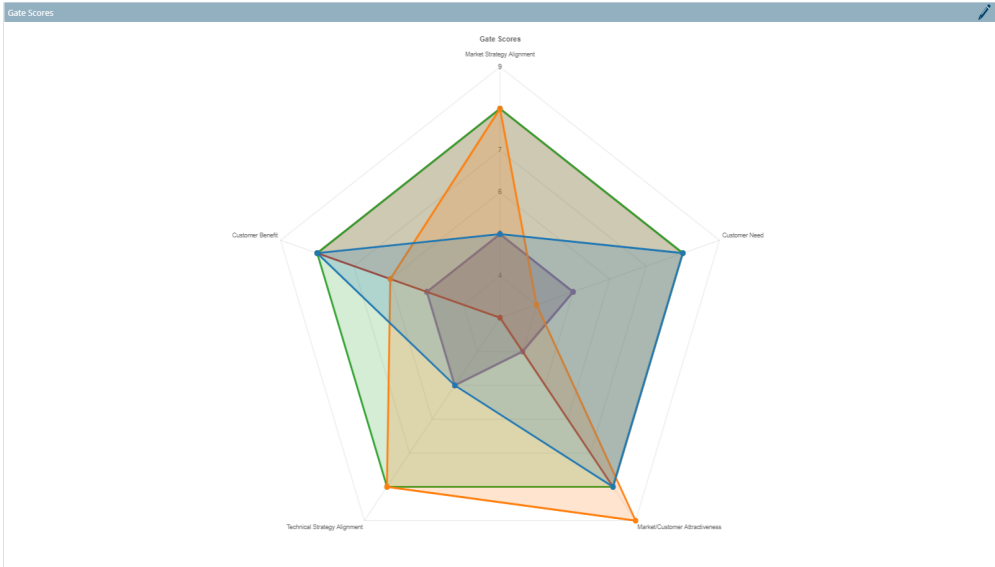
Field	Description
	After the chart renders, toggle a key label in the legend to hide and show data without changing the underlying chart and report configuration.
<b>Color Theme</b>	Select the color palette to assign to the regions.

9. (Optional) If you edited an existing chart, click  in the upper right corner to view the new chart.
10. Click **Save** to save your changes and create the chart.


**Example - Creating Radar Charts in Accolade**

For example, a user wants to review their portfolio of projects, and identify which ones continue to best fit their company's overall strategy based on a set of current gate scores. The user has created a Business Opportunity Report for their chart report source, and selected the **Project Name, Market Strategy Alignment, Customer Need, Market/Customer Attractiveness, Technical Strategy Alignment, and Customer Benefit** metrics to be included in the report.

To create a radar chart to display this information, the user has selected **Project Name** as the **Polygons** value, and the **Market Strategy Alignment, Customer Need, Market/Customer Attractiveness, Technical Strategy Alignment, and Customer Benefit** metrics as the **Spokes** values to create shapes that compare the gate scores for various projects. Toggle a key label in the legend to hide and show data in the rendered chart.




**Notes:**


- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.

## Adding Target Lines to Bar Charts

In order to characterize Accolade data more completely, it can be helpful to include a threshold line or target value indicators to your chart. Bar charts include an option to display and hide target data for a project or portfolio. Users can add target lines to grouped, stacked, and vertical bar charts to visually represent a benchmark line and add context for the viewer. Adding interpretation to the data visualization helps the viewer understand the information being presented in the chart.

### To add target lines to a bar, grouped bar, or stacked bar chart:

1. From the **Project > Charts & Reports** page, click the name of the chart and click  to edit the chart details.
2. In the **Target Line Report Source** field, select the online report to be referenced.

 The **Target Line Report Source** does not have to be the same report as used for the chart's **Report Source**. If the **Report Source** and the **Target Line Report Source** are different reports, the values in the **Target Line Report Key** column should match the values in the **Grouping** column.

3. In the **Target Line Report Key** and **Target Line Report Value** fields, select the report columns from the selected source above that will be referenced to create target lines.

The **Target Line Report Value** controls what values the targets lines display in the chart.

- If the **Target Line Report Source** column selected contains rows with unique values, the **Target Line Report Value** will display the relative metric value as the target line.
- If the **Target Line Report Source** column selected contains rows with duplicate values, the target line will display as the aggregated totals of the **Target Line Report Value** metric values from each row of data.
- When **Cycle Segments** is set to **Horizontal Axis**, the target lines will only be applied to the original value, as defined for the horizontal axis.

Examples 1 & 2 discuss how to create a chart with target lines using one or multiple chart sources, and the Target Line Report Source column contains unique values per project. Example 3 discusses how to create a chart with target lines using aggregated metric totals.

### Example 1 - Bar Charts Using One Report Source

For example, a user has several different projects that are all reporting yearly sales numbers, and wants to review how each project performed against their individual sales target. For the report, the user has created a Project Sales Report that includes the **Project Name**, and selected the **Total Sales** and **Sales Forecast** metrics to be included in the report.

Using the Project Sales Report as the source for both the chart and the target lines, make the following selections for a bar chart:

- For the chart setup, select **Project Name** as the **Grouping** value and **Total Sales** as the **Bar** value, to create bars that represent the total sales for each project.
- For the targets setup, select **Project Name** as the **Target Line Report Key** value and **Sales Forecast** as the **Target Line Report Value**, to create target lines that represent the sales targets for each project.

The user could include additional sales data metrics in the chart and report in order to create grouped bar and stacked bar charts to represent additional comparison views.

### Example 2 - Bar Charts Using Different Report Sources

Using the same scenario from Example 1, the user is again reviewing how each project performed against their individual sales target. In this example, the user will still create a report to gather the yearly sales numbers from the projects, however the sales targets are defined in a reference table stored in Accolade, so they will need to create a second report to use this table information to create target lines.

For the chart report, the user has created a Project Sales Report that includes the **Project Name**, and selected the **Total Sales** metric to be included in the report. For the target line report, the user has [created a Sales Reference Table report](#) that uses the reference table data for its information source.

Using the Project Sales Report as the source for the chart, and the Sales Reference Table as the source for the target lines, make the following selections for a bar chart:

- For the chart setup, select **Project Sales Report** as the **Report Source**, **Project Name** as the **Grouping** value and **Total Sales** as the **Bar** value, to create bars that represent the total sales for each project.
- For the targets setup, select **Sales Reference Table** as the **Target Line Report Source**, **Project** as the **Target Line Report Key** value and **Sales Goal** as the **Target Line Report Value**, to create target lines that represent the sales targets for each project.

As with the single source grouped bar and stacked bar examples, the user can include additional metrics in their chart and reports in order to visually represent the comparisons.

### Example 3 - Bar Charts Using Aggregated Metric Totals

In this scenario, the user has several regions that are being reviewed against their regional yearly sales targets. There are multiple projects within each region, so the user needs to aggregate both the sales numbers and the total sales forecast for each region. For the report, the user has created a Regional Sales Report that includes data for all of the projects in the region, and selected the **Sales Region**, **Total Sales**, and **Projected Sales** metrics to be included in the report.



Using the Regional Sales Report as the source for both the chart and the target lines, make the following selections for a bar chart:

- For the chart setup, select **Regional Sales Report** as the **Report Source**, **Sales Region** as the **Grouping** value and **Total Sales** as the **Bar** value, to create bars that represent the total sales numbers for each region. Since there are multiple projects in each region, the bar will display the aggregated **Total Sales** value.
- For the targets setup, select **Regional Sales Report** as the **Target Line Report Source**, **Sales Region** as the **Target Line Report Key** value and **Projected Sales** as the **Target Line Report Value**, to create target lines that represent the total sales targets for each region. Again since there are multiple projects in each region, the target line will display the aggregated **Projected Sales** value.

As with the previous examples, the user can include additional metrics in their chart and reports in order to visually represent the comparisons.


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**Important!** When adding targets to bar charts, keep the following guidelines in mind:

- Select appropriate data types and values to render a meaningful chart and targets. The system will not prevent you from selecting different data types and will plot selected data as best as possible without error.
- Target lines can be turned on and off by clicking on the Targets legend within the chart.
- Target lines are only valid for use in bar charts that are displayed vertically.
- In stacked bar charts, target lines will not display if **Stacked to 100%** is selected.

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**Notes:**

- To delete a saved chart, display the chart from the **Charts & Reports** page, click  to display the chart settings, and click **Delete** at the bottom of the page. Only the chart owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the chart.
- If the **Replace Empty Value** system parameter is set to **0**, charts may render inconsistently due to empty or missing data returned by the report.
- Reporting Rights are not required to view the chart in a page layout; however a user must be an owner or have at least one matching user role for the chart to display in the layout.

## Creating HTML Reports

An HTML report uses a single SQL query to gather data and can be accessible from the **Charts & Reports** page or from within a project. Users who have the role assignment selected in the report can also select to receive the report in the body of an email.

- 💡 Use the **Report Privacy Warning Text** system parameter to add a notification within the report to indicate the content is private or confidential, and should not be forwarded to others.


Consider the following when designing HTML reports:

- An HTML report displayed on the **Charts & Reports** page may display information about multiple projects. That same report displayed within a project contains only the data for that project. Data that is not project-related is displayed the same in both locations.
- HTML reports can range in size. Ensure your company's email server accommodates the file size and volume required to send required reports to all the selected users
- HTML reports display in a set, non-editable format. To create a report using formatting, create an [MS Excel report](#) and format it as necessary.


Prior to creating an HTML report, create and save the SQL Query on which the HTML report is based.

**Note:** The queries that are available for selection are based on your access group permissions as defined in your [user profile](#). Only queries that the user has "Can Edit" access for will be available for selection. Additionally, access group settings for the query must match the user permissions of other Process Designers in order to display for them.



#### To create an HTML report:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.  
To narrow the list, search by the report name or category.
2. Do one of the following:
  - **To add a new report** - Click **Add New** and select **HTML Report** from the drop-down list.
  - **To edit an existing report** - Click the name of the report to edit and click  to edit the report details.
3. Complete the following information to identify and define the data included in the report:


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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the report.
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the report in queries, reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among reports, and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Description</b>	<p>Enter a description of the purpose or nature of the report.</p> <p>This description helps other users identify the report throughout the system.</p>
<b>Category</b>	<p>Enter or select the group to which this report belongs.</p> <p>Use categories to organize like reports together. For example, if there are a large number of reports that the IT department uses to track user logins, use a category to group those reports together.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Query</b>	<p>Select a saved query.</p> <p>The report displays data gathered from the database for the defined query.</p> <p> When defining the query for the report, using <b>LinkableName</b> instead of the <b>ProjectName</b> column makes the project's name a hyperlink to the project from the generated email.</p>
<b>Notification</b>	<p>Select the Notifications option from the following:</p> <ul style="list-style-type: none"> <li>• <b>Hide</b> - The report is not available for selection on the <b>My Profile</b> page.</li> <li>• <b>Show</b> - Displays the report as an option to schedule, share, or receive immediately on the <b>My Profile</b> page for users with the roles selected in the <b>Roles</b> field.</li> <li>• <b>Required</b> - Makes the report required and lists it on the <b>My Profile</b> page for users with the roles selected in the <b>Roles</b> field. Select the days of the week that the report is sent to the selected users. Users can modify the day</li> </ul>

Field	Description
	selections or choose to not receive required reports on their <b>My Profile</b> page.
<b>Configuration Access Groups</b>	Select the access groups to which the report belongs. Process Designers with matching permissions will be able to edit and view the report. The access groups displayed are based on the current user's access group permissions and the access groups the report belongs to.
<b>Process Model Usage</b>	Click the <b>Process Model Usage</b> button to see a list of process models that the HTML report is associated with. The list includes all process models the report is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.
<b>Active In</b>	<p>Select where the report is available within Accolade.</p> <ul style="list-style-type: none"> <li>• <b>Charts &amp; Reports</b> - Displays the report on the <b>Charts &amp; Reports</b> page. Clicking this check box will place the report in the <b>Shared Charts &amp; Reports</b> section of the <b>Charts &amp; Reports</b> page. If unchecked, the report will only be available to the assigned owners in their <b>My Charts &amp; Reports</b> section.</li> <li>• <b>Projects</b> - Displays the report within a project. For a report to be available for association with a process model, it must be active in projects.</li> </ul> <p>If the report is not ready for viewing, clear all the check boxes.</p>
<b>Transpose</b>	<p>Select the check box to display reports that contain only one project as a vertical column rather than a row.</p> <p>If you select to transpose a report that contains reports for multiple projects, the transposed result displays data for only the first project in the report.</p>
<b>Roles</b>	<p>Select the system user roles that have access to view the report.</p> <p>Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the report on the <b>Charts &amp; Reports</b> page, as well as select to receive the report through an email if the report is available for notifications.</p>

4. Click  in the Report Details to ensure the report pulls the correct data and is working as you intended. Click  to return to the Report Details after previewing the report.
5. Click **Create** to create the new report or **Apply** to save changes to an existing report.

**Notes:**

- To display an HTML report within a project, the report must be added at the process model level, either by [adding it to the Reports List pod](#), or by [adding it to a pod within a layout](#) that is assigned to the process model.
- To delete an HTML report, display the report from the **Charts & Reports** page, click  to display the report settings, and click **Delete** at the bottom of the page. Only the report owner, users assigned as owners with All Reporting Rights, and Process Designers with All Reporting Rights can delete the report. Deleting a report does not delete the query on which the report is based. To remove a report from view but keep its definition for use later, clear the selections in the **Active in** field.
- Categories created for queries, HTML reports, or MS Excel reports are saved in common and apply to all three. To remove a category from the list, ensure that no queries, HTML reports, or MS Excel reports are assigned to the category.

## Accolade Excel Reports Overview


Accolade Excel reports can be added to the **Charts & Reports** page within Accolade and/or to a process model for availability within a project. These reports are built and viewable in Excel, provide flexibility in formatting, and can be created using the Accolade Office Extensions add-in application. The application provides an interface to create a data report based on Accolade data.

### Creating Accolade Excel Reports using Accolade Office Extensions

With the Accolade Office Extensions add-in, anyone in your organization with All Reporting Rights can create a report in Excel using the add-in.



Reports created via the Accolade Office Extensions add-in provides the following advantages:










- No SQL knowledge is required. You can select Accolade data directly from the report interface without writing SQL queries.
- Reports can be refreshed when downloaded from Accolade to contain up-to-date information and formatted for distribution or review, query-based tables cannot.

 Use the **Report Privacy Warning Text** system parameter to add a notification within the report to indicate the content is private or confidential, and should not be forwarded to others.


The information below assumes you are using the Accolade Office Extensions add-in to create reports and assumes you are familiar with basic Excel functionality. For more information about manipulating the data in a report, see the online Help available from within the add-in.

#### To create an Accolade Excel report:


1. Open Excel and navigate to the Accolade menu in the Excel ribbon.  
This allows Excel to pull data from Accolade into the report and allows reports to be created or refreshed to display current Accolade information.  
 If necessary, connect to the appropriate server by clicking **Server** and entering the server URL.
2. Click **Data Reports** and do one of the following:
  - **To add a new report** - Click **Add New**.
  - **To create a report based on an existing report** - Click  to copy the report.
  - **To edit an existing report** - Click the name of the report to open it for editing.
3. Select a subject from the drop-down list, such as **Projects** or **Users**, to display the column sets available within that subject.

4. Double-click or drag and drop the column names from the left side of the dialog to any area in the **Columns** tab to include the column in the report.
  - To search for a column, enter search criteria in the **Find** field after selecting the subject.
  - Use the  and  options to expand or collapse the subject data sets in order to select specific column options.
  - To include an entire column set, drag and drop the column set to the **Columns** tab.
  - To change the column order of selected columns, drag and drop a column into a new location within the list.
  - To remove a column, click  in the corresponding row.
5. *(Optional)* Refine the content of the report as necessary.
  - **Rename columns** - Click in one or more selected columns and enter a new column name that is more appropriate for the report you are creating.
  - **Set column sorting** - Click  next to one or more selected columns to indicate whether the column is sorted in ascending or descending order. If you select more than one column to sort by, indicate the order in which the columns sort; 1 being the primary sort, 2 the secondary sort, and so on.
  - **Determine column properties** - For number and date columns, click  or  in the **Properties** area to group data together by aggregation or select date formats. Select the aggregate method or date format and click away to apply the changes. All selected aggregate methods are added to the report columns list with the aggregate method appended to the column name.  
 For example, to summarize the total costs for all projects within a brand, select **Sum** as the aggregate value in a column that represents the total costs for a project.
  - **Add Count Column** - If you select to summarize values within the report, click  **Add Count Column** to add a column that shows how many rows of source data are combined in the summary row.
    -  You can order and rename the added column as you can other columns; however, you can add only one **Count** column to the report.
  - **Add Calculated Column** - Click  **Add Calculated Column** to [add a column to the report that displays a calculation based on other column data](#).
6. *(Optional)* On the **Filters** tab, double-click or drag and drop the column name from the left side of the dialog to any area in the **Filters** tab to use it as [filter criteria that data must match](#) to be included in the report.
7. *(Optional)* On the **Report Details** tab, add the following information:

Field	Description
<b>Report Name</b>	Enter a name which identifies the report.
<b>Report Location</b>	Select one of the following options for the location to place the report: <ul style="list-style-type: none"> <li>• <b>Existing worksheet</b> - Select this check box to add the report to an existing worksheet that does not already contain a report, and select the appropriate existing worksheet name from the drop-down list.</li> <li>• <b>New worksheet</b> - Select this check box to create and add the report to a new worksheet, and enter the name for the new worksheet.</li> </ul>
<b>Override Project Filtering</b>	Select this check box to include the entire report set from within a project.  The report will not filter to project-specific data when viewed from within a project, and will <a href="#">display all projects in a portfolio</a> regardless of security.
<b>Transpose</b>	Select this check box to transpose the column and row data when the report is rendered.

- On the **Advanced Matrix Settings** tab, if more than one matrix was selected in the report columns, click  **Add** to [add the matrix join definitions](#).
- Click **Done** to apply your changes and generate the report.
- Save the report to an accessible location.

**Notes:**

- Click **Refresh Columns** in the lower left of the dialog to refresh the columns. Any columns modified in the Accolade application while the user is creating or editing the report will be updated. Deleted columns will be removed from list of available columns and will display red in the **Columns** tab and **Filters** tab. Delete the selections in red to correct the report.
- To delete a saved report created in Excel, click **Data Reports** in the Accolade menu on the Excel ribbon and click  next to the corresponding report. Deleting a report created using the Accolade Office Extensions add-in deletes report data being pulled from Accolade into the workbook. Deleting a report directly from the worksheet does not delete the data associated with the report.



## Adding Calculated Columns to Accolade Excel Reports

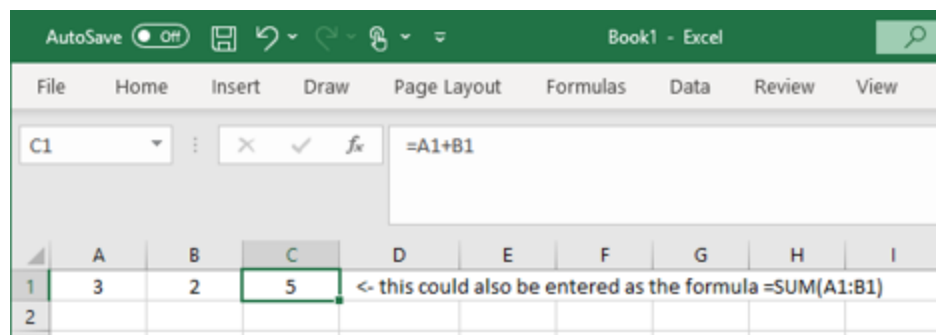
Reporting details can be contained in multiple sources within Accolade. To combined related data values to be used for reporting or the creation of charts or presentations, users can create reports that include calculated columns that calculate and/or display combined data, allowing users to manipulate and analyze Accolade data values.

For example, a user may have several different project metrics that represent categories of project costs such as Administrative, Operating, Marketing, etc. In order to calculate and display the sum of these project costs within an Accolade report or chart, the user can include a calculated column in their report setup.

### Example

Writing a calculated column formula in Accolade is slightly different than writing an equation in math class, or using formulas in Excel. The most notable difference is the use of the equal sign (=). For example, if you want to add the numbers 3 and 2:

- In math class, the equation would read **3+2=**, with a calculated value of **5**.
- In Excel, formulas start with the equal sign, so it would look like **=3+2**. When entered, the value in the selected cell would return as **5**. If you wanted to add two cell values, it would look something like **=A1+B1** or **=SUM(A1:B1)**. Assuming the values in A1 and B1 were 3 and 2 respectively, it would return the value **5**.




- In an Accolade Excel report created using the Accolade Office Extensions add-in, the equal sign is assumed, so it does not need to be included in the formula field. If you wanted to add the values of Column A and Column B, it would look like **[Column A] + [Column B]** or **Sum([Column A], [Column B])**. Assuming the first row values of Column A and Column B were 3 and 2 respectively, it would return the value **5**.

	A	B	C	D	E
1	Example Report				
2					
3	<b>Project Name</b>	<b>Column A</b>	<b>Column B</b>	<b>Sum of Columns A &amp; B</b>	
4	Project Example 1	3	2	5	
5	Project Example 2	4	9	13	
6	Project Example 3	2	7	9	
7					

### To add a calculated column to an Accolade Excel report:

**Note:** See below for a list of calculations that are currently supported for reporting.

1. [Create a new report or open an existing report for editing.](#)
2. On the **Columns** tab, ensure the columns to be used in the calculation are included in the report.

 Report calculations are executed from left to right. In order for selected columns to be used in a calculated column, they must a) be selected as a column for the report, and b) be included before they are referenced by a calculated column (this means they must appear to the left of the calculated column when displayed, or above the calculated column when selecting columns in the report setup).

3. Click  **Add Calculated Column.**

The column is added with two fields - one for the display name for the column, and one for the formula to be calculated.

4. In the left field, enter the column name to be displayed when the report is generated.
5. In the *f* field, enter the formula to be calculated within the report.

When entering your formula, the columns are referenced by enclosing the column display name inside of square brackets. In the example above, Column A is entered as **[Column A]**.

6. Click *f* to select the appropriate datatype for the calculated column.
  - **Date** - Select this option when you want the column data to display as a Date datatype, for example when using the DateAdd function to project a future project date.

- **Number** - Select this option when you want the column data to display as a Number datatype, for example when using the Sum function to combine the values of two or more columns of expense values.
  - **String** - Select this option when you want the column data to display as a String datatype, for example when using the Concatenate function to display user name and functions combined in one column.
7. *(Optional)* Drag and drop the calculated column to a new location within the list.  
 Note that while the calculated column cannot be displayed in the report until after its reference columns are displayed, you can have calculated columns that are displayed between data columns as necessary. Using the example above, after the **Sum** column we could add **Column C** and **Column D** to the report and then add another calculated column, and so forth.
  8. Finish setting up the report, as necessary.
  9. Click **Done** to apply your changes and generate the report.
  10. Save your changes to the report.

### Available Formulas for Calculated Columns in Reporting

The following section details the operators and functions that are available for use when creating your calculated column formulas.

---

**Important!** Note that the examples use "Column A", "Column B", and "Column C" to generically refer to the display names of different columns that are included in the report data.

---

### Operators

Operators are process or mathematical parts of expressions, such as addition and multiplication, and relationships such as greater than or less than. Use the operators below within your calculated column expressions.

Operator	Example
<b>Additive and Subtractive Operators</b>	
+ (plus, plus sign)	[Column A]+[Column B]
- (minus, dash)	[Column A]-[Column B]
<b>Multiplicative Operators</b>	
* (multiplied by, asterisk)	[Column A]*5
/ (divided by, slash)	[Column A]/[Column B]
% (mod, percent sign)	[Column A]%10

Operator	Example
<b>Primary Operators</b>	
value (integers, text strings, dates, functions)	('this is a text string')  💡 While single quotes work for dates, we recommend wrapping dates in pound or hash signs instead to ensure consistency of data types. For example, (#2021-10-19#).
( ) (parentheses)	1000-(6*[Column A])
<b>Relational Operators</b>	
= (equals)	[Column A]=250
<> (does not equal)	[Column A]<>[Column B]
> (greater than, angle bracket)	[Column A]>250
>= (greater than or equal to)	[Column A]>=250
< (less than, angle bracket)	[Column A]<500
<= (less than or equal to)	[Column A]<=100
<b>Logical Operators</b>	
or,    (double pipe)	[Column A]<[Column B]  [Column A]<500
and, &&	[Column A]<[Column B]&&[Column A]<1000

## Functions

The functions included in the calculated column formula determine in part what is returned in the column. Use the functions described below within your calculated expressions to return data within a calculated column.


For more information on the description or formatting for the calculations below, see ["Calculated Metric Expressions Reference" on page 136](#).

Function	Example Formula
Abs	Abs([Column A])
Acos	Acos([Column A])

Function	Example Formula
Asin	Asin([Column A])
Atan	Atan([Column A])
Avg	Avg([Column A], [Column B], [Column C])
Ceiling	Ceiling([Column A])
Concatenate	Concatenate('text1',[Column A], 'text2', 'textN')
Contains	Contains([Column A], 'My Blue Heaven', 2, 7)
Cos	Cos([Column A])
DateAdd	DateAdd('D', 5, [Column A])
DateDiff	DateDiff('D',[Column A], [Column B])
DatePart	DatePart('M', [Column A])
Exp	Exp([Column A])
Find	Find([Column A], 'My Blue Heaven', 2, 20)
First	First([Column A], [Column B], [Column C])
Floor	Floor([Column A])
IEEERemainder	IEEERemainder([Column A], [Column B])
If	If([Column A]>500, 'Go ahead', 'Stop')
In	In([Column A], 1, 2, 3)
Join	Join([Column A], [Column B], [Column C]), ' ')
Length	Length([Column A])
Log	Log([Column A], 10)
Log10	Log10([Column A])
Lower	Lower([Column A])
LTrim	LTrim([Column A])
Max	Max([Column A], [Column B], [Column C])
Min	Min([Column A], [Column B], [Column C])
Now	Now()

Function	Example Formula
Pow	Pow([Column A], 2)
Replace	Replace([Column A], 'Blue', 'red')
Round	Round([Column A], 2)
RTrim	RTrim([Column A])
Search	Search('blue', [Column A], 5, 30).
Sign	Sign([Column A])
Sin	Sin([Column A])
Sqrt	Sqrt([Column A])
SubString	SubString([Column A], 4, 10)
Sum	Sum([Column A], [Column B], [Column C])
Tan	Tan([Column A])
Trim	Trim([Column A])
Truncate	Truncate([Column A])
Upper	Upper([Column A])

**Notes:**

- To delete a calculated column from an Accolade Excel report, click **Data Reports** in the Accolade menu on the Excel ribbon and click the name of the report to open it for editing. Expand the **Columns** tab, and click  in the corresponding calculated column row to delete it. Click **Done** to apply your changes and generate the report and save your changes to the report.

## Adding Dynamic Filters to Accolade Excel Reports

Capture and filter report data using relative metric and metadata field codes to create dynamic reports that display data according to defined filters within the report. Filtering reports based on relative metrics and metadata field codes allows you to narrow the returned data set while still generating a higher level view. Dynamic filters allow you to view a subset of data from within different projects.


---

**Important!** Ensure the **Override project filtering** check box is selected on the report settings. This enables the report to include data across a subset of projects.

---

### To add dynamic filters to an Accolade Excel report:

1. [Create a new report, or open an existing report for editing.](#)
2. Click and expand the **Filters** tab.
3. To add filters, double-click or drag and drop the column names from the left side of the dialog to any area in the **Filters** tab.
  - To search for a column to add as a filter, enter search criteria in the **Find** field after selecting the subject.
  - To include an entire column set, drag and drop the column set to any area in the **Filters** tab.

 If multiple filters are added to the report, data must meet ALL filter criteria to be included in the report.
4. For each added filter, select the operator and filter criteria that report data must match to be included.

The filter operators are dependent on the column selected to filter by, and generally include options such as =, is empty, is one of, does not contain, and more.

The filter type must be selected from one of the following, and the following field identifies the criteria to be met:

- **Metadata** - Enter the field code display name and select from the returned list. Ensure you enter a [valid query field code](#).
- **Metric** - Enter the metric display name and select from the returned list.
- **Text** - Enter or select a static string or numeric value such as a date.
- **Current User** - Filters the report to data only applicable to the user logged in and viewing the report. Current User is only available for numeric or ID data type columns.

- 💡 Type ahead to search for metrics and field codes when defining the filter criteria. Only metrics and field codes that match the data type of the filter display for selection. For example, if you select a date filter, you can only select date metrics or field codes to define the relative filter.

For example, to create a report that returns a list of deactivated users, filter on the User Active column to return only users where the active flag is set to **No**.

The screenshot shows the 'Selected Filters' tab in the report configuration interface. It features a 'Project Name' label, a 'Runtime Filter' checkbox (unchecked), and a filter configuration row. The row contains an equals sign (=) in a dropdown, the word 'Text' in another dropdown, and a text input field containing 'No'. A close button (X) is located in the top right corner of the filter configuration area.

5. (Optional) Select the **Prompt on Refresh** check box to prompt the user to review and/or update the filters when refreshing the data in the report.
6. Finish setting up the report, as necessary.
7. Click **Done** to apply your changes and generate the report.
8. Save your changes to the report.

#### Notes:

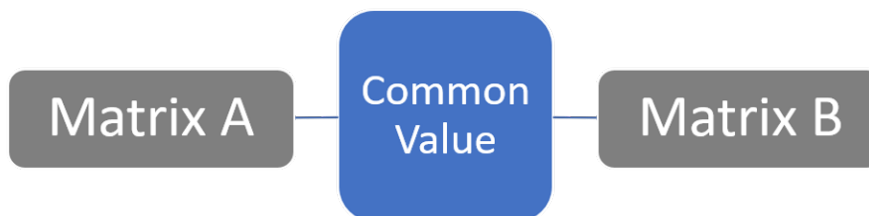
- To delete a filter from an Accolade Excel report, click **Data Reports** in the Accolade menu on the Excel ribbon and click the name of the report to open it for editing. Expand the **Filters** section, and click in the corresponding filter row to delete it. Click **Done** to apply your changes and generate the report, and save your changes to the report.
- Long string and multi-select list metrics are currently not supported for use as metric filters.


## Adding Multiple Matrices to Accolade Excel Reports

Reporting details can be contained in multiple sources within Accolade. To consolidate data into a single source to be used for reporting or the creation of charts or presentations, users can create reports to combine the data. Information from more than one project matrix can be pulled into a report by including a common value that is included in the sources, for example, using a Department or Region metric or a common Row ID.

In addition to selecting the matrix and metric columns to be included in the report, users must create join statements that define how the matrix information is related.



**To add multiple matrices to an Accolade Excel report:**

1. [Create a new report or open an existing report for editing.](#)
2. On the **Advanced Matrix Settings** tab, select the matrices and metrics to be included in the report.
3. Click  **Add** to add the matrix join statements.
4. In each side of the dialog, select one of the matrices from the drop-down list, and select an option to use as the common value to join the matrices.

The two selected matrices must be different, but the matrix/metric combination can be any combination of metrics or row IDs, as long as the selected metrics share a common value and are of the same data type.

Selecting a metric will define it as the common value between the two matrices. Note that it can be the same metric if it is used in both matrices, or it can be different metrics that will have the same value in both matrices. In addition, a metric used as a common value does not need to be added as a reporting column in order to be used to create the join statement.

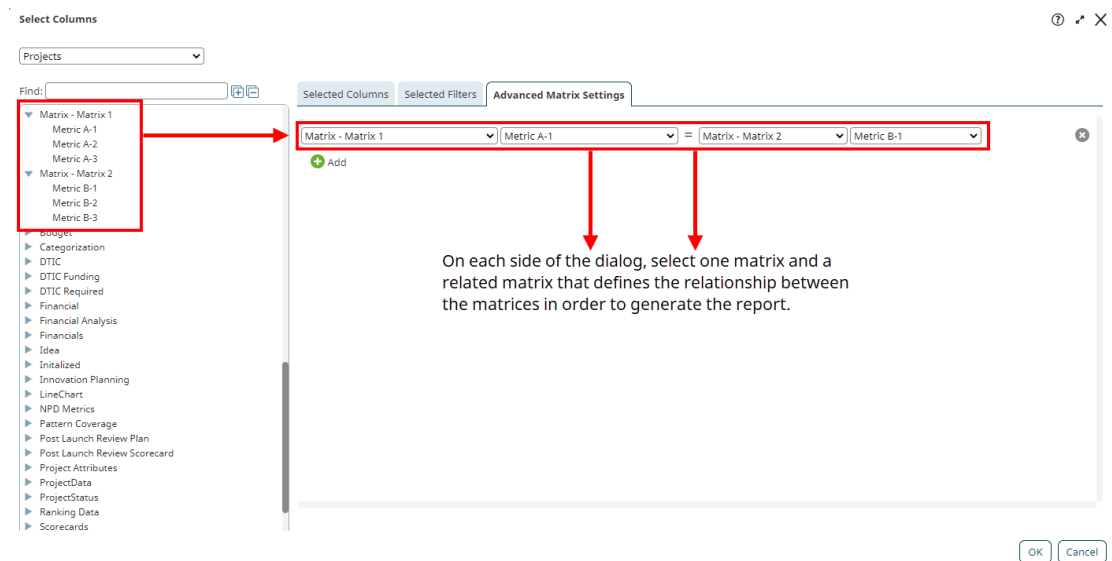
Selecting Row ID will compare matrices by rows, for example Row 1 in Matrix A will be compared with Row 1 in Matrix B, and so on. This can be used when there are no additional common values in the two matrices, and the matrices have a direct line-by-line comparison.



---

**Caution!** Selecting Row ID as a common value can cause inconsistencies in reporting. Since assigned Row IDs are not visible within a matrix, report results can be incorrect if rows have been deleted from a matrix or if there is a mismatch.

---



- Repeat steps 3-4 to add additional matrix join statements as necessary.

All included matrices must have at least one related join statement, but a matrix can be referenced in more than one statement. For example, if you choose to include metrics from Matrix A, Matrix B, and Matrix C, you would need to create two statements to join the information. You could create a statement that relates A to B, and one that relates B to C, or you could have a statement that relates A to B, and one that relates A to C.

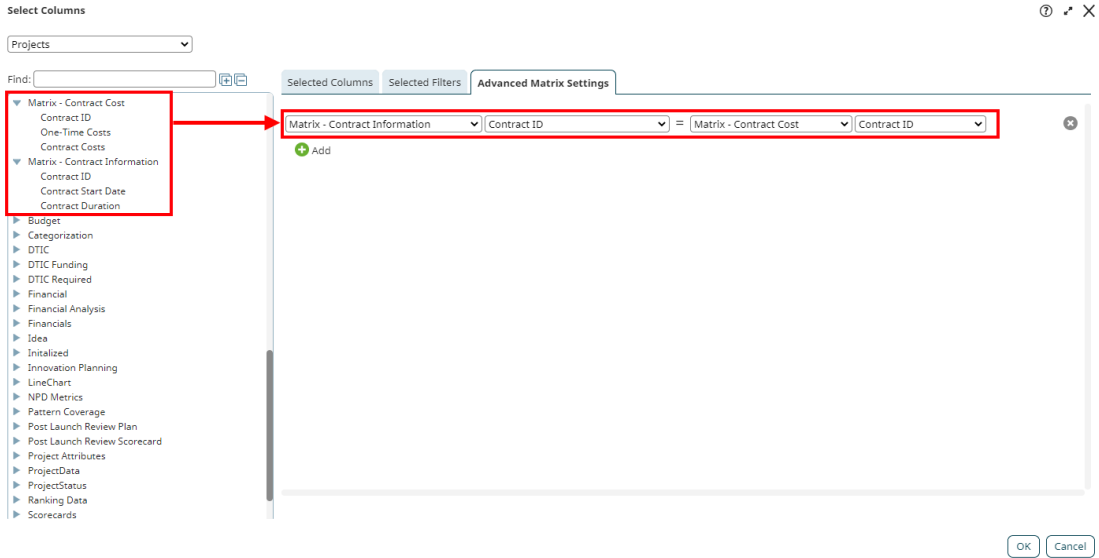
- Finish setting up the report, as necessary.
- Click **Done** to apply your changes and generate the report.

**Note:** [EMPTY] or blank cells in your report may indicate a mismatch in the common value linking the matrices. If the project value referenced in the join statement is not defined in one of the matrices, for example if there is not a matching value in both matrices, or a matrix contains empty rows, the report will return partial or full rows that contain [EMPTY] values.

#### EXAMPLE

For example, a user has two different matrices that contain information related to vendor contracts for their projects, and needs to create a report containing relevant information from both matrices. They have a matrix named **Contract Information**, which contains the start date and duration of the specific contracts, and a second matrix named **Contract Cost**, which contains the costs related to the specific contracts.

To pull this information into one report, the user has added the related columns to the **Columns** tab, and created a join statement in the **Advanced Matrix Settings** tab that links the two matrices using the **Contract ID** metric that is a member of both matrices.



Once the user enters the remaining report details and clicks **Done**, the following report is generated.

Contract Information Matrix                      Contract Cost Matrix

	A	B	C	D	E	F	G
1	Contract Details						
2							
3	<b>Project Name</b>	<b>Contract ID</b>	<b>Contract Start Date</b>	<b>Contract Duration</b>	<b>Contract ID</b>	<b>One-Time Costs</b>	<b>Contract Costs</b>
4	Emotion Electronics	A100	6/1/2019	12 Month Term	A100	\$ 2,100.00	\$ 12,500.00
5	Emotion Electronics	A101	6/1/2020	12 Month Term	[EMPTY]	\$ -	\$ -
6	Emotion Electronics	[EMPTY]	1/1/1900	[EMPTY]	A110	\$ 1,400.00	\$ 12,500.00
7	Smith Marketing	28501	6/1/2018	12 Month Term	28501	\$ 8,400.00	\$ 10,125.00
8	Smith Marketing	34886	6/1/2019	12 Month Term	34886	\$ 1,850.00	\$ 12,750.00
9	Express Services	001684-0197	10/21/2019	24 Month Term	001684-0197	\$ -	\$ 1,840.00
10	ACME Company	AC1217	4/1/2018	12 Month Term	AC1217	\$ 2,500.00	\$ 5,000.00
11	ACME Company	AC1924	4/1/2019	12 Month Term	AC1924	\$ -	\$ 5,300.00
12	ACME Company	AC2101	4/1/2020	12 Month Term	AC2101	\$ 500.00	\$ 6,150.00
13	Fred's Grocery	[EMPTY]	1/1/1900	[EMPTY]	[EMPTY]	\$ -	\$ -
14	Fred's Grocery	[EMPTY]	1/1/1900	[EMPTY]	[EMPTY]	\$ -	\$ -

Note the following:

The **Contract ID** field is the common identifier included in both matrices, and used to connect the relevant information.

Columns B-D contain information that is from the **Contract Information** matrix in the related projects.

Columns E-G contain information that is from the **Contract Cost** matrix in the related projects.


The highlighted sections below show two different scenarios that may indicate missing or incomplete data.

- Rows 5 & 6 of the report display **[EMPTY]** in some of the data cells, which indicates Contract IDs values that are not found in both matrices. In row 5, the information for contract A101 is only included in the Contract Information matrix, so the related Contract Cost matrix fields are **[EMPTY]**. In row 6, the information for contract A110 is only included in the Contract Cost matrix, so the related Contract Information matrix fields are **[EMPTY]**.
- Rows 13 & 14 display **[EMPTY]** cells in all of the data cells, which indicates that one or more of the included matrices either does not have any rows added, or contains empty rows.

**Note:** Although the **[EMPTY]** returned values are an indicator of potential issues, the mismatched values reported are dependent on the data type. String and list metrics will display as **[EMPTY]**. As shown in the example below, a number metric will display **0**, and a date metric will represent the default **1/1/1900** date.

	A	B	C	D	E	F	G
1	Contract Details						
2							
3	<b>Project Name</b>	<b>Contract ID</b>	<b>Contract Start Date</b>	<b>Contract Duration</b>	<b>Contract ID</b>	<b>One-Time Costs</b>	<b>Contract Costs</b>
4	Emotion Electronics	A100	6/1/2019	12 Month Term	A100	\$ 2,100.00	\$ 12,500.00
5	Emotion Electronics	A101	6/1/2020	12 Month Term	[EMPTY]	\$ -	\$ -
6	Emotion Electronics	[EMPTY]	1/1/1900	[EMPTY]	A110	\$ 1,400.00	\$ 12,500.00
7	Smith Marketing	28501	6/1/2018	12 Month Term	28501	\$ 8,400.00	\$ 10,125.00
8	Smith Marketing	34886	6/1/2019	12 Month Term	34886	\$ 1,850.00	\$ 12,750.00
9	Express Services	001684-0197	10/21/2019	24 Month Term	001684-0197	\$ -	\$ 1,840.00
10	ACME Company	AC1217	4/1/2018	12 Month Term	AC1217	\$ 2,500.00	\$ 5,000.00
11	ACME Company	AC1924	4/1/2019	12 Month Term	AC1924	\$ -	\$ 5,300.00
12	ACME Company	AC2101	4/1/2020	12 Month Term	AC2101	\$ 500.00	\$ 6,150.00
13	Fred's Grocery	[EMPTY]	1/1/1900	[EMPTY]	[EMPTY]	\$ -	\$ -
14	Fred's Grocery	[EMPTY]	1/1/1900	[EMPTY]	[EMPTY]	\$ -	\$ -

**Notes:**

- To delete a matrix join statement from an Accolade Excel report, click **Data Reports** in the Accolade menu on the Excel ribbon and click the name of the report to open it for editing. Click the **Advanced Matrix Settings** tab, and click  in the corresponding definition row to delete it. Click **Done** to apply your changes and generate the report and save your changes to the report.

## Excel Report Templates Overview

Add MS Excel report templates to the **Charts & Reports** page within Accolade and to a process model for availability within a project. These reports are built and viewable in MS Excel, provide flexibility in formatting, and can be created using the Accolade Office Extensions add-in application. The application provides an interface to create a data report based on Accolade data. You can also create MS Excel reports using a template and the Accolade query infrastructure, creating charts and tables based on data pulled into the spreadsheet using queries.

## Creating Excel Report Templates using Accolade Office Extensions

- 💡 Create an online report within Accolade instead of in Excel using the Accolade Office Extensions add-in to create a refreshable report without having to leave Accolade and without having to install the Accolade Office Extensions add-in.

Anyone in your organization with All Reporting Rights can create an Excel report using the Accolade Office Extensions add-in. Created reports via the add-in provides the following advantages:

- No SQL knowledge is required. You can select Accolade data directly from the report interface without writing SQL queries.
- Reports can be refreshed when downloaded from Accolade to contain up-to-date information and formatted for distribution or review, query-based tables cannot.
- A spreadsheet template containing a report created via the add-in can also be used as the template for a deliverable or activity. The template is created the same way as a report template, and is [added to the Template Library](#) as a Process Document type template instead of as a Report type.

- 💡 Use the **Report Privacy Warning Text** system parameter to add a notification within the report to indicate the content is private or confidential, and should not be forwarded to others.

The information below assumes you are using the Accolade Office Extensions add-in to create reports and assumes you are familiar with basic Excel functionality. For more information about manipulating the data in a report, see the online Help available from within the add-in.


### To create an MS Excel report:

1. Open Excel and navigate to the Accolade menu in the Excel ribbon.










This allows Excel to pull data from Accolade into the report and allows reports to be created or refreshed to display current Accolade information.

- 💡 If necessary, connect to the appropriate server by clicking **Server** and entering the server URL.


2. Click **Data Reports** and do one of the following:

- **To add a new report** - Click **Add New**.
- **To edit an existing report** - Click the name of the report to open it for editing.
- **To create a report based on an existing report** - Click  to copy the report.

- 💡 Use the arrow in the **Report Name** heading to sort reports in ascending or descending order.

3. Select a subject from the drop-down list, such as **Projects** or **Users**, to display the column sets available within that subject.
4. Double-click or drag and drop the column names from the left side of the dialog to any area in the **Columns** tab to include the column in the report.
  - To search for a column, enter search criteria in the **Find** field after selecting the subject.
  - Use the  and  options to expand or collapse the subject data sets in order to select specific column options.
  - To include an entire column set, drag and drop the column set to the **Columns** tab.
  - To change the column order of selected columns, drag and drop a column into a new location within the list.
  - To remove a column, click  in the corresponding row.
5. *(Optional)* Refine the content of the report as necessary.
  - **Rename columns** - Click in one or more selected columns and enter a new column name that is more appropriate for the report you are creating.
  - **Set column sorting** - Click  next to one or more selected columns to indicate whether the column is sorted in ascending or descending order. If you select more than one column to sort by, indicate the order in which the columns sort; 1 being the primary sort, 2 the secondary sort, and so on.
  - **Determine column properties** - For number and date columns, click  or  in the **Properties** area to group data together by aggregation or select date formats. Select the aggregate method or date format and click away to apply the changes. All selected aggregate methods are added to the report columns list with the aggregate method appended to the column name.  
 For example, to summarize the total costs for all projects within a brand, select **Sum** as the aggregate value in a column that represents the total costs for a project.
  - **Add Count Column** - If you select to summarize values within the report, click  **Add Count Column** to add a column that shows how many rows of source data are combined in the summary row.  
 You can order and rename the added column as you can other columns; however, you can add only one **Count** column to the report.
  - **Add Calculated Column** - Click  **Add Calculated Column** to [add a column to the report that displays a calculation based on other column data](#).
6. *(Optional)* On the **Filters** tab, double-click or drag and drop the column name from the left side of the dialog to any area in the **Filters** tab to use it as [filter criteria that data must match](#) to be included in the report.
7. *(Optional)* On the **Report Details** tab, add the following information:

Field	Description
<b>Report Name</b>	Enter a name which identifies the report.
<b>Report Location</b>	Select one of the following options for the location to place the report: <ul style="list-style-type: none"> <li>• <b>Existing worksheet</b> - Select this check box to add the report to an existing worksheet that does not already contain a report, and select the appropriate existing worksheet name from the drop-down list.</li> <li>• <b>New worksheet</b> - Select this check box to create and add the report to a new worksheet, and enter the name for the new worksheet.</li> </ul>
<b>Override Project Filtering</b>	Select this check box to include the entire report set from within a project. The report will not filter to project-specific data when viewed from within a project, and will <a href="#">display all projects in a portfolio</a> regardless of security.
<b>Transpose</b>	Select this check box to transpose the column and row data when the report is rendered.

8. On the **Advanced Matrix Settings** tab, if more than one matrix was selected in the report columns, click  **Add** to [add the matrix join definitions](#).
9. Click **Done** to apply your changes and generate the report.
10. Save the report to an accessible location.
11. [Add the report to the Template Library](#) using the **Report** type for access within Accolade.

**Notes:**

- To modify an existing Excel report, download the file from the Template Library, make the necessary changes and re-upload the file to the Template Library.
- If the report is set to display within a project, and if you want the report to display project data from projects other than the one it displays in, for example, related projects, create the custom property **SGM\_SYS\_UnconstrainedProjectLevelReport** in the document.

## Creating Excel Report Templates Using Queries

**Note:** Although the **Report - Excel <version>.xltx** base template is still available, Sopheon recommends creating online reports available from **Workspace > My Workspace > Charts & Reports**, or using the Accolade Office Extensions add-in.

If you are comfortable writing SQL queries, or if you need to create a report that requires an advanced database query, add a workbook to an Excel file that is populated with data from queries created within Accolade. To use queries within an Excel report, use the **Report - Excel <version>.xltx** base template available on the [Base Templates Reference Page](#). This file is set with the workbooks and structure required for creating Excel reports that contain queries.

You can create a file based on **Report - Excel <version>.xltx** and save it to the Template Library to use as a base template for similar reports. However, in doing so:

- Do not delete, insert, or rearrange the data columns on the data worksheets. The column structure on these worksheets must match that of their queries. Rewrite queries to match the data worksheets.
- Do not add Excel pivot tables or other sets of data to the data worksheets.
- Do not add formulas to the columns of the data tables on the data worksheets. You can add formulas to the columns to the right of the rightmost query-populated column. The import automatically propagates the formulas across the imported data.
- Include only numbers, letters, underscores, and periods in the heading of a formula column. Other characters cause an "Invalid Name" error when the workbook is opened in Accolade.

The information below describes how to add queries to an Excel file. For information about the Accolade query infrastructure, see the Queries Overview topic in the online Help.

**Note:** The queries that are available for selection are based on your access group permissions as defined in your [user profile](#). Only queries that the user has "Can Edit" access for will be available for selection. Additionally, access group settings for the query must match the user permissions of other Process Designers in order to display for them.

#### To create an MS Excel report using a query:

**Note:** The following procedure assumes that you have created the appropriate queries for the report and that you are familiar with basic Excel functionality.

1. [Add an Excel report to Accolade](#).  
Select the queries to use in the report and select either the **Report - Excel <version>.xltx** file or a template based on it as the template file.
2. Click **Preview** to populate Accolade data into the file and save the preview file to your computer.  
Save the file using a name that identifies the nature and purpose of the report. This is the file that becomes the template that is added back to the Template Library.
3. Check the first data worksheet to confirm that the data is what you want and to identify the cell range it occupies.



For the workbook to refresh correctly, the worksheet must contain at least two rows of data. If the query only retrieved one row, add a second row of data manually on the data worksheet and identify both rows in data ranges.

4. *(Optional)* To manipulate the data with formulas, add the formulas to the right or left of the table.
5. Continue to format the workbook by inspecting the next data worksheet, adding a new worksheet, and creating a report. You can create one or more reports for each data worksheet in the workbook.
6. Hide the data worksheets and any other worksheets that users of the report should not modify.
7. Save the completed Excel workbook to your computer and [add the template to the Template Library](#).
8. From the **System** menu, select **Content Sources > Charts & Reports Manager**, and click the name of the report you created in step 1.
9. In the **Template** field, select the MS Excel file you added to the Template Library in step 8.
10. Click **Update** to save the changes to the report.

**Notes:**

- When a query refreshes the data set, it can retrieve more, or fewer *rows*, but it cannot retrieve a different number of *columns* from the database.

## Creating MS Excel Reports in Project Currencies

By default, currency values included in MS Excel reports are shown in the corporate currency. However, some projects may track their values in a local currency that is different than the corporate currency. To convert values into the project currency, use the **Currency Report Template <version>.xltm** base template available on the [Base Templates Reference Page](#), or in the Template Library, as a starting point to build the report.

**Note:** The information in this topic details how to create MS Excel reports if your currencies are defined using the general currency conversions and Corporate Currency system parameter method. If you use the recommended date-specific currency conversions method, you can create a report in a project currency using calculations based on the metrics defined to capture the project's currently selected currency. Before creating a report that uses a project's currency, define the currency conversions.

To add a currency conversion to a project report template, add a conversion table to a worksheet within the file and set cross references from the report cells to the conversions. You can also select the format in which currencies display.

**Note:** An Administrator or Process Designer must also have All Rights to Reporting for access to create the Accolade Office Extensions report using the currency conversions reference table.


**To create an MS Excel report in a project's currency:**

**Note:** The procedure below assumes that you have Accolade Office Extensions installed.

1. Save the **Currency Report Template <version>.xltm** file to your computer and open the file in Excel.
2. Within Accolade Office Extensions, click **Data Reports** and click **Add New** to add a report.
3. Select the **Reference Tables** subject.
4. Select **Currency Conversions** from the **Available Reference Tables** list, and select to include the **Currency Code** and **Conversion Factor** columns in the table.

These two columns enable you to select the correct conversion factor to convert the corporate currency values in the database into the project currency values you want to display in the report. You can select additional columns that may be helpful in identifying the currencies available.

5. Continue through the dialog options, select the worksheet and provide a table name that identifies the table as the currency conversion table, and click **Finish** to add the table.

 Conversion tables are typically included on a separate worksheet so you can hide the worksheet before adding the report template to the Template Library.


6. [Create the rest of the report](#), including the currency metrics to convert.
7. In the cell where you want to convert a currency value, enter the following formula:

```
=ConvertToCurrency (cell, "code")
```

where

- `cell` is the reference to cell containing the value to convert
- `code` is the three-digit currency code of the currency to convert to. The code must be contained in quotes.

For example, `=ConvertToCurrency (A2, "JPY")` to convert the currency from the corporate currency to Japanese Yen.

 To format the value, see the procedure below.

- Copy the formula down the right side of the table to every row containing values to be converted to the project currency and hide the column that contains the values to be converted.

Adding the formulas to the column to the right of the column containing the corporate currency values leaves the column of converted values in the original position of the now hidden column

- Save the file with a name that clearly identifies the nature and purpose of the report.
- [Add the file to the Template Library.](#)

#### To format a currency value in an MS Excel report:

- Open a report that contains a currency conversion table (as created in the procedure above).
- Open the Accolade menu in the MS Excel ribbon, select the conversion table you created in the procedure above and click **Modify**.
- Select to include **Format 1** and **Format 2** and click **Finish**.
- In the cells that contain the `=ConvertToCurrency(cell, "code")` formula (see step 6 above), add the `format` column heading parameter.

`=ConvertToCurrency(cell, "code", "format column heading")`

This parameter is either `Format1` or `Format2` in the Currency Conversion table you modified in step 3 that contains the numeric format to display.



#### Example

	A	B	C	D	E
1	My Currency Report				
2					
3	<b>Project Name</b>	<b>DBE Cost [USD]</b>	<b>DBE Revenue [USD]</b>	<b>Cost [JPY]</b>	<b>Revenue [JPY]</b>
4	My Example	1500	4500	¥6000	¥18000

Note the formula displayed in the formula field.

- Save the file and [add it to the Template Library.](#)

## Adding Excel Report Templates to Accolade

For an Excel report to be viewable in the **Charts & Reports** page or in projects within Accolade, an Administrator or Process Designer must add the report to Accolade.

#### To add an Excel report to Accolade:

**Note:** You must have a report template with the type Spreadsheet Report saved in the Template Library prior to adding an Excel report using the instructions below.

- From the **System** menu, select **Content Sources > Charts & Reports Manager**.  
To narrow the list, search by the report name or category.

2. Do one of the following:
  - **To add a new report** - Click **Add New** and select **MS Excel Report** from the drop-down list.
  - **To edit an existing report** - Click the name of the report to open it for editing.
3. Complete the following information to identify and describe the report:


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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the report.
<b>System Name</b>	Enter a unique, shorter name that identifies the report in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among reports, and can contain only letters (English alphabet), numbers, and the underscore.
<b>Description</b>	Enter a description of the purpose or nature of the report.  This description helps other users identify the report throughout the system.
<b>Category</b>	Enter or select the group to which this report belongs.  Use categories to organize like reports together. For example, if there is a large number of financial reports, a Project Manager can use a category selection to locate only financial reports. <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Query</b>	If the report is created using the Accolade query infrastructure, select up to five queries to create tables in the report.  Each query copies its data to the indicated Excel worksheet.
<b>Configuration Access Groups</b>	Select the access groups to which the report belongs.

Field	Description
	Process Designers with matching permissions will be able to edit and view the report. The access groups displayed are based on the current user's access group permissions and the access groups the report belongs to.
<b>Process Model Usage</b>	Click the <b>Process Model Usage</b> button to see a list of process models that the MS Excel report is associated with.  The list includes all process models the report is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.
<b>Active In</b>	Select where the report is available within Accolade.  <ul style="list-style-type: none"> <li>• <b>Charts &amp; Reports</b> - Displays the report on the <b>Charts &amp; Reports</b> page. Clicking this check box places the report in the <b>Shared Charts &amp; Reports</b> section of the <b>Charts &amp; Reports</b> page. If unchecked, the report will only be available to the assigned owners in their <b>My Charts &amp; Reports</b> section.</li> <li>• <b>Projects</b> - Displays the report within a project. Clicking this check box will make the report available for association with a process model.</li> </ul> If the report is not ready for viewing, clear all the check boxes.
<b>Template</b>	Select the file from the Template Library that serves as the basis for the report.
<b>Roles</b>	Select the system user roles that have access to view the report.  Users with one or more matching user roles and either Refresh Workbook Data or All Reporting Rights will be able to view the report on the <b>Charts &amp; Reports</b> page, as well as select to receive the report through an email if the report is available for notifications.

4. Click **Create** to create a new report or **Apply** to save changes to an existing report.

**Notes:**

- To delete an Excel report, display the report from the **Charts & Reports** page, click  to display the report settings, and click **Delete** at the bottom of the page. Only the report owner, users assigned as owners with All Reporting Rights, and

Process Designers with All Reporting Rights can delete the report. Deleting a report does not delete the query or the file in the Template Library on which the report is based. To remove a report from view but keep its definition for use later, clear the selections in the **Active in** field.

- Categories created for queries, HTML reports, or MS Excel reports are saved in common and apply to all three. To remove a category from the list, ensure that no queries, HTML reports, or MS Excel reports are assigned to the category.

## Setting Custom Excel Report Template Properties

Using the Accolade Office Extensions add-in to create Excel reports, you can add and modify custom properties based on your report and template needs. Use the custom Excel document properties described below for Excel reports attached to a deliverable or activity or available from the **Charts & Reports** page. Custom properties include how data is refreshed, server information, and where log files are saved.

**Note:** Accolade does not refresh the data for non-document owners, regardless of the settings in the file.

### Refresh on Open

Microsoft templates contain a custom property, **SGM\_SYS\_RefreshOnOpen**, which determines how the document's content is refreshed when it is opened in Accolade.

If the report is used as a template in a deliverable or activity, when a document owner downloads the template from the Deliverable or Activity dialog within a project, the data is refreshed, regardless of the **SGM\_SYS\_RefreshOnOpen** setting. For document versions, document owners are prompted to refresh the data.

#### To set the refresh on open properties in an Excel report template:

1. [Create the Excel report template](#) and [save it to Accolade](#).
2. Download the document and open it in Excel.

Downloading the document from Accolade saves Accolade-specific properties to the document.

3. Display the document's advanced properties.

How to display the advanced properties varies across applications and versions.

Typically, property options are located under the **File** menu. Refer to the Excel online Help for the specific location in the version you are using.

4. In the Properties dialog box, click the **Custom** tab.
5. From the properties list, select **SGM\_SYS\_RefreshOnOpen**.
6. In the **Value** field, enter one of the following options:

- **ALWAYS** - Refreshes the template automatically on open from **Charts & Reports**.
  - **PROMPT** - Displays a prompt to select whether to refresh the data.
7. Save the template and [add it to the Template Library](#).

## Refresh Fields on Worksheets

Add the custom **SGM\_RefreshFieldsOnWorksheet** property to an Excel report template to specify which worksheets are scanned for Accolade field codes. Specifying worksheets using this parameter can improve the performance of large reports.

### To set which worksheets to scan for field code refresh:

1. [Create the Excel report template](#) and [save it to Accolade](#).
2. Download the document and open it in Excel.  
Downloading the document from Accolade saves Accolade-specific properties to the document.
3. Display the document's advanced properties.  
How to display the advanced properties varies across applications and versions. Typically, property options are located under the **File** menu. Refer to the Excel online Help for the specific location in the version you are using.
4. In the Properties dialog box, click the **Custom** tab.
5. In the **Name** field, enter the case sensitive name **SGM\_RefreshFieldsOnWorksheet**.
6. From the **Type** list, select **Text**.
7. In the **Value** field, enter the names of the worksheets that contain Accolade field codes, separating the names with a backslash (\).
8. Click **Add**.
9. Save the template and [add it to the Template Library](#).

## Enable Output Log Files

Add the custom **SGM\_LOG\_DIRECTORY** property to an Excel report template to create an output file that collects log files from the Accolade Office Extensions add-in. Use the generated logs file when [troubleshooting server call issues](#).

1. [Create the Excel report template](#) and [save it to Accolade](#).
2. Download the document and open it in Excel.  
Downloading the document from Accolade saves Accolade-specific properties to the document.
3. Display the document's advanced properties.
4. In the Properties dialog box, click the **Custom** tab.
5. In the **Name** field, enter the case sensitive name **SGM\_LOG\_DIRECTORY**.

6. From the **Type** list, select **Text**.
7. In the **Value** field, enter a file folder path where the logs will collect.
8. Click **Add**.
9. Save the template and [add it to the Template Library](#). Save the workbook with the added custom property to enable the add-in to collect logs to the specified directly.  
To disable the add-in from collecting logs, remove the custom property and save the workbook.



## Queries Overview

Any one in your organization that is familiar with SQL and writing database queries can write a query to retrieve data from the Accolade database. However, only Administrators and Process Designers can add those queries to Accolade for use in metrics, charts and reports.

**Note:** Although a working knowledge of SQL is required to formulate complex queries, you may be able to gather the information needed with a basic query, or by using the available reporting features with Accolade.


Queries select data from reporting views, which map data into logical groupings by concept, such as projects or classes. For information about the reporting types, see ["Reporting Views Overview" on page 628](#). Each reporting view and its contents is listed in ["Project Reporting Views \(RVP\\_\) Reference" on page 643](#) and ["Non-Project Reporting Views \(RV\\_\) Reference" on page 631](#). You can also create and preview the following query:

```
SELECT * from RV_ReportingViews
```

## Adding Database Queries

Use queries to retrieve project data and other data from the Accolade database to display in a query-based list metric. Accolade provides views into the database in the form of reporting views. Reporting views group like data together that you can use to write a query. For example, RV\_Classes contains the data that is relevant to classes within Accolade, and RV\_ProcessModels contains information you can use to report on process models and their usage within Accolade.

After you have identified the type of data you want to retrieve, review the [RV\\_ and RVP\\_ reporting views](#) to determine which view contains the data you need.

 To quickly view the list of all reporting views in Accolade, from the **System > Content Sources > Queries** menu, create and preview the following query: `SELECT * from RV_ReportingViews`. Substitute the RV\_ReportingViews portion of the query with any reporting view name to see the list of all columns within that view.

### To create a database query:

1. From the **System** menu, select **Content Sources > Queries**.  
To narrow the query list, search by the query name, system name, or category.
2. Do one of the following:
  - **To add a new query** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing query** - Click the name of the query to open it for editing.


## 3. Complete the following information to identify the query:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the query.
<b>System Name</b>	<p>Enter a unique, shorter name that identifies the query in reporting views, field codes, and other places in Accolade.</p> <p>The name must be unique among queries, and can contain only letters (English alphabet), numbers, and the underscore.</p>
<b>Description</b>	<p>Enter a description of the purpose or nature of the query, and the data it returns.</p> <p>This description helps other users identify the query throughout the system.</p>
<b>Category</b>	<p>Enter or select the group to which this query belongs.</p> <p>Use categories to organize like queries together. For example, you may choose to group all the queries used for financial analysis into the same category, in order to separate them from queries that are used for different purposes.</p> <ul style="list-style-type: none"> <li>• Leave this field blank to add to the <b>Default</b> category.</li> <li>• To define a new category, select <b>New Category</b> and enter the category name.</li> <li>• To delete a category, remove every item from the category. Empty categories are deleted automatically.</li> </ul>
<b>Configuration Access Groups</b>	<p>Select the access groups to which this query belongs.</p> <p>Process Designers with matching permissions will be able to edit and view the query. The access groups displayed are based on the current user's access group permissions and the access groups the query belongs to.</p>
<b>Process Model Usage</b>	<p>Click the <b>Process Model Usage</b> button to see a list of process models that the query is associated with.</p> <p>The list includes all process models the query is included in, as well as links to the <a href="#">process model's component tree</a> pages you have Edit access to.</p>

4. In the **SQL** field, enter the [code for the query](#).
5. Click **Preview** to ensure the query pulls the correct data and is working as you intended.
6. Click **Create** to create a new query or **Apply** to save changes to an existing query.

**Notes:**

- You may intend a query to display a chart or report either on the **Charts & Reports Manager** page within a project, or in both locations. When charts and reports display on the **Charts & Reports Manager** page, they can display information about multiple projects. However, the same chart or report is restricted within a project to show only data related to the project it is viewed in. Data not related to projects, such as data from RV\_ views, is not affected.
- If a query contains a reference to a RVP\_ or CRVP\_ reporting view, the result displays **[Unavailable]** when used on an external Idea Submission form. External users do not have the security rights to see the data contained within those views.
- To delete a query, click  in the **Delete** column on the Queries page.
- Categories created for queries, HTML reports, or MS Excel reports are saved in common and apply to all three. To remove a category from the list, ensure that no queries, HTML reports, or MS Excel reports are assigned to the category.

## Query Examples

See the sections below for examples of common, basic queries that you may use in your business. If you require a more complex query, review external resources about writing SQL queries, or contact [Sopheon Customer Support](#).

- [Selecting Data from a Single View](#)
- [Restricting Data Returned](#)
- [Selecting Data from Multiple Views](#)
- [Arranging Results](#)
- [Replacing Default Column Headings](#)
- [Including Links to Accolade Projects](#)
- [Tallying Results](#)
- [Personalizing Results](#)

### Selecting Data from a Single View

The most basic query retrieves selected columns of data from a reporting view.

```
SELECT TeamLeaderName, TeamLeaderEmail  
FROM RVP_Projects
```

The query above returns all project managers and their email addresses from the RVP\_Projects report view, which reports on all opened and closed Accolade projects.

### Restricting Data Returned

To restrict the results to only those records that have specific properties, filter the query using a `WHERE` clause. For example, you could write a query to retrieve records of projects devoted to a specific market, or records of projects where a metric identifies the project as behind schedule.

```
SELECT ProjectName
FROM RVP_Projects
WHERE DateCreated > '01/01/2014'
```

The above query returns a list of all projects created since January 1, 2014.

### Selecting Data from Multiple Views

Queries can return data from more than one view.

```
SELECT P.ProjectName, PM.ProcessModelName
FROM RVP_Projects P, RV_ProcessModels PM
WHERE P.ProcessModelID = PM.ProcessModelID
```

The query above returns the project name and model name for all records where the model's ID is the same in the RVP\_Projects and RV\_ProcessModels reporting views. The query produces a report showing the model used for each project.

In this query, the "P" is defined as an alias for the RVP\_Projects view and "PM" is defined as an alias for RV\_ProcessModels. In the `FROM` clause, the aliases ensure that each field is selected from the correct view. The `WHERE` clause ensures that each data pair is drawn from rows containing the same model ID.

### Arranging Results

To arrange the items returned by the query, add the `ORDER BY` keyword to the end of the query.

```
SELECT TeamLeaderName, ProjectName
FROM RVP_Projects
WHERE ProjectClosed = 0
ORDER BY TeamLeaderName
```

The query above returns the names of the assigned project managers and the names of projects, listed alphabetically by the project manager's name.

### Replacing Default Column Headings

Each query returns data using default column headings, which might not be as meaningful as you need them to be in the returned results. Replace the Accolade default column headings in

reports with more understandable expressions using `AS` to substitute the name of your choice for the default column name.

```
SELECT ProjectName AS Project, TeamLeaderName AS Project_
Leader, CurrentStageName AS Current_Project_Stage
FROM RVP_Projects
WHERE ProjectClosed = 0
ORDER BY ProjectName
```

The above query returns three columns that display as “Project,” “Project Leader,” and “Current Project Stage” in the results. Accolade replaces the underscore character in aliases with a space. In this example, the `WHERE` filter limits the results to open projects.

### Including Links to Accolade Projects

Make the project names in a report behave as hyperlinks to each project’s initial page, as defined in its model to provide quick access to a project’s details directly from a report.

To create a report that shows project names as hyperlinks, replace the `ProjectName` column in the query with the text `LinkableName`.

```
SELECT LinkableName from RVP_Projects
```

The query above returns a list of all open or closed projects with each project name as a link to the project details.

```
SELECT TeamLeaderName, LinkableName
FROM RVP_Projects
WHERE ProjectClosed = 0
ORDER BY TeamLeaderName
```

The query above returns the names of the assigned project managers and the names of projects, listed alphabetically by the project manager’s name, with the project name as a link to the project details.

### Tallying Results

Tally the number of items returns in a query using `COUNT` clause.

```
SELECT TeamLeaderName AS Leader,
COUNT(*) AS Leaders_Projects FROM RVP_Projects
WHERE ProjectClosed = 0
GROUP BY TeamLeaderName
ORDER BY TeamLeaderName
```

The query above returns a list of project managers of active projects in alphabetical order with a count of the number of active projects assigned to each project manager. The count displays in a column named `Leaders Projects`.

### Personalizing Results

Create queries that display information specific to the user viewing the report using the `$USERID$` substitution token in a `WHERE` clause in the query.

```
SELECT * FROM RVP_ProjectDelivActivities
WHERE ActivityOwnerID = $USERID$
```

The query above displays a list of all activities that the user is currently assigned.

The `$USERID$` token must be set equal to a column that contains a user ID, such as `TeamLeaderID`, `DeliverableOwnerID`, and so on.

---

## Chapter 5

# Configuring the Accolade Site

Accolade provides the option to configure portions of the site so it better fits with your company terminology, location, and general application use. Administrators and Process Designers can update the following components of the Accolade web site:

- [Menu Items](#)
- [Logos, Splash Screens, and Page Header and Footer Text](#)
- [Translating Application Text to Another Language](#)
- [System-wide Application Terminology](#)
- [Class-level Terminology](#)
- [Extended Fields](#)
- [Deliverable and Activity Details Display Options](#)
- [Project Link Types](#)
- [Currencies](#)
- [Time Tracking Components](#)

## Adding Menu Items for Multiple Users (Global Links)

Administrators and Process Designers can add additional menus, or items within existing menus for all users, or all users that have a specific role assignment. Use these global links to link to websites, FTP sites, email, local intranet sites, or files available on the company's network.

Menus and menu items added using global links display in the following order:

- Menu items added to a menu display in the assigned Category, in the order in which they appear in the Global Links configuration page.
- New menus display to the right of the default menu options in the Accolade menu bar, in the order from left to right that they display in the Global Links configuration page. For example, if Menu C is listed above Menu A in the list, Menu C displays to the left of Menu A in the menu bar.
- If a global link is added to the **My Links** menu, which contains links set for individual users within their user account or profile, the **My Links** menu follows the order described in the previous bullet item. If the **My Links** menu contains no global link items, it displays as a default menu at the right of the default Accolade menu bar.

Items added as URL-type global links (http, https, and relative path links) are available to embed in a pod within a page layout, which then renders the contents of the link. Defining global links for this purpose can be helpful when building dashboard pages for projects.

To define a link that is available to a single user, see ["Adding User-Specific Menu Items" on page 95](#).



### To add a menu item for multiple users:

1. From the **System** menu, select **Page Design > Global Links**.
2. Do one of the following:
  - **To add a new global link** - Click **Add New** in the upper right corner of the page.
  - **To edit an existing global link** - Click the name of the global link to open it for editing.
3. Complete the following information about the link:

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the global link.  This text is also displayed above the linked page if the page is embedded.
<b>System Name</b>	Enter a system name that uniquely identifies the global link.




Field	Description
	The name must be unique among classes and can contain only letters (English alphabet), numbers, and the underscore.
<b>Display in Menu</b>	<p>Check to turn on the display of the link in the Accolade menu. If on is selected, check to make Menu and Category required fields that cannot be set to none.</p> <p><b>Note:</b> This defaults to unchecked when adding a global link. Defaults to checked when a new global link is added from Planning View.</p>
<b>Menu</b>	<p>Select the Menu location.</p> <ul style="list-style-type: none"> <li>• Select New Menu to create a new menu for the link.</li> <li>• Select an existing menu, such as <b>Workspace</b> or <b>Resource</b>, to add the global link to an existing menu.</li> </ul> <p>To create a global link that is only available to add to a pod within a layout, leave this option blank.</p>
<b>Category</b>	<p>Select the Category location.</p> <ul style="list-style-type: none"> <li>• Select New Category to create a new category for the link.</li> <li>• Select an existing category such as <b>My Workspace</b>, <b>My Pages</b> or <b>Planning</b>, to add the global link to an existing category.</li> </ul> <p>To create a global link that is only available to add to a pod within a layout, leave this option blank.</p>
<b>Link</b>	<p>In the <b>Link</b> field, select the link type to create.</p> <ul style="list-style-type: none"> <li>• <b>http</b> - A URL to a Web page.</li> <li>• <b>https</b> - A URL to a secure Web page.</li> <li>• <b>ftp</b> - A link to an FTP download site.</li> <li>• <b>file</b> - A link to a file or executable on your company's intranet.</li> <li>• <b>qvp</b> - A link to a Dashboards for Accolade chart if using the Dashboards viewer.</li> <li>• <b>mailto</b> - Opens the user's email application and displays a blank email addressed to this email address.</li> <li>• <b>callto</b> - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat.</li> </ul>


Field	Description
	<p>In the adjacent field, enter the path to complete the link. For example, if you select <b>http://</b> from the <b>Link</b> field, enter the remainder of the web site address, <code>www.google.com</code>.</p> <p> Based on your server setup, http, https, and file global link types are available to add as the content of a pod within a page layout.</p> <p>The <b>Disable Link to File</b> and <b>Disable Link to Website</b> parameter settings determine if you can link to web site or file.</p>
<b>Embed</b>	<p>Select this check box to display the linked destination within the Accolade application window. Clear the check box to open the linked page in a new browser window or tab.</p> <hr/> <p><b>Important!</b> 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.</p> <hr/>
<b>Landing</b>	<p>Select this check box to display the linked destination first for the users with the selected role, instead of the users' Home pages.</p> <p>If a role has more than one link defined as a landing link, Accolade displays the first landing link in the list of global links.</p>
<b>Default Home</b>	<p>Select this check box to have a designated home page for the selected users.</p> <p>For users with multiple roles, the first link with a role match in the list of defined global links determines the users' default home page.</p> <p> A home page defined by the user profile settings will take precedence over the global link home page setting.</p>
<b>Roles</b>	<p>Select one or more user roles for whom the global link displays.</p>

Field	Description
	Users who are not assigned the selected roles do not have access to the global link in the menu, and the content of the link within a pod in a layout does not display.

4. Click **Apply** to save your changes, or **Cancel** to exit without saving.

-  To change the order that added menus display from left to right in the Accolade menu bar, display the Global Links Configuration page (**System > Page > Global Links**), select a link description, and drag and drop it to its new location in the list.

**Notes:**

- To delete a global link, display the link in the Global Links Configuration page (**System > Page Design > Global Links**) and click  next to the link to delete.

## Configuring System Consent

To comply with policies or regulations, your organization may need to provide employees an intelligible and easily accessible consent form, including for GDPR compliance. The General Data Protection Regulation (GDPR) is a regulation set by the European Commission to strengthen the protection of European resident personal data used by organizations as part of the Data Protection Act.

Administrators upload text files to be used as consent forms that prompt users to read and submit the form upon login. Users who do not submit a consent form will not be able to access Accolade.

---

**Important!** Do not enable or upload versions when users are actively working in the system to prevent losing unsaved work. Enabling system consent or uploading new versions will redirect users immediately after clicking **Apply**.

---

### To configure consent forms:

1. **From the System menu, select System > Consent.**
2. To add a consent form version, do one of the following:
  - **Upload a new consent form** - Click **Upload New Version** and **Load File** to upload a new consent form.
  - **Create a version from the existing version** - Click the file name to download the version and upload the file as a new version.
3. Select the text file (.txt) containing the consent form verbiage and content, and click **Open**.
4. Click **Upload File**.
5. Select the **Enable System Consent Prompt** check box to enable the consent prompt for all users.

The consent page will not display for users unless this check box is checked.

---

**Important!** Only the latest version prompts users at login when **Enable System Consent Prompt** is set.

---

6. Click **Apply** to save your changes.

## Maintaining the System Consent page

As part of maintaining system consent, you may need to view and modify users who have previously given consent or users who have withdrawn consent. A list of uploaded text documents displays with the version number, the user who uploaded the file, the date the file was uploaded, and a field to leave comments for each version.

**To view user consent history:**

1. From the **System** menu, select **System > Consent**.
2. Click **User Consent History** to monitor users that have given consent.  
The **User Consent History** dialog provides the user's name and login, the date of acknowledgment, and the consent version.
3. *(Optional)* Click **Download** to view the **User Consent History** offline.

Additionally, if a user withdraws consent, your organization may need to manually remove all personal data associated to that user per legal directives and requirements. The system will not automatically remove the user when consent is withdrawn. Removing a user does not delete the user name from the system. For historical record and auditing purposes, projects and other areas of the system will still reference the original user name even when that user is removed. To mask the user name, change the user's name to a generic placeholder like Bob M#####. A name with a strike-through indicates a deleted user (i.e., ~~Bob M#####~~) throughout the system.

**Note:** Renamed deleted users are not removed as the owner of deliverable or activities in either completed or currently in progress documents. Originally named owners will show in history data.


Removing a user deletes the following user data:

- User Image
- User Email
- Chat Address
- User extended field values

Understand that deleting a user is a permanent action and the user cannot be restored.

**Note:** If your organization uses Active Directory, manually update or remove a user from the Active Directory.

**Notes:**

- To delete a consent file, check the box under the  correlating to the desired version to be removed. Click **Apply** to save your changes.
- Making changes to an existing version will not replace the original version. Upload the file as a new version to apply the changes.
- The consent prompt does not display for add-ins or external idea submissions.

## Configuring System Settings for Collaboration Integration

Administrators and Process Designers can select Microsoft Teams or Slack for collaboration. Microsoft Teams options include chat, call and schedule meetings with individual and multiple users. Slack includes chat. This allows users the ability to launch these communication tools within Accolade based on your organization's settings.

**Note:** In order for the "Connect Accolade Project to Teams Channel" feature to work, the Microsoft Teams Integration parameters must be arranged. [Learn more about the Microsoft Teams Integration parameters here.](#)

**To set Microsoft Teams integration:**

---

**Important!** You must have the Microsoft Teams connection functionality installed before proceeding. See the [Accolade Installation Guide > Installing the Accolade Application > Configuring Accolade](#), for more.

---

1. From the **System** menu, select **System > Settings**, then select the **Collaboration Integration** tab.
2. In the **Select Integration** drop-down menu, select **Microsoft Teams**.
3. Under **Functionality**, select from the following that are checked by default.
  - Teams Chat
  - Teams Call
  - Teams Schedule Meeting
  - Connect Accolade Project to Teams Channel
  - Create New Channel for Project
  - Create New Team for Project
4. Click **Apply**.

**To enable OneDrive integration:**

---

**Important!** You must have the Microsoft 365 Web Apps & OneDrive integration installed before proceeding. See the [Accolade Installation Guide > Installing the Accolade Application > Configuring Accolade](#), for more.

---

1. From the **System** menu, select **System > Settings**, then select the **Collaboration Integration** tab.
2. Select **Microsoft 365 integration options**.
3. Check the **Integrate with OneDrive** checkbox to activate this option.
4. Click **Apply**.

**To enable MS Teams Files integration:**

---

**Important!** You must have the Microsoft Teams connection functionality installed before proceeding. See the [Accolade Installation Guide > Installing the Accolade Application > Configuring Accolade](#), for more.

---

1. From the **System** menu, select **System > Settings**, then select the **Collaboration Integration** tab.
2. Select **Microsoft 365 integration options**.
3. Check the **Integrate with MS Teams Files** checkbox to activate this option.
4. Click **Apply**.

**To set Slack Integration:**

1. From the **System** menu, select **System > Settings**, then select the **Collaboration Integration** tab.
2. In the **Select Integration** drop-down menu, select **Slack**.
3. Enter the **Slack Bot Token** and click **User Load**.

A new load is needed to add or remove users from Slack. If the Slack token is changed, the integration will not work and needs to be updated in Accolade.

4. Under **Functionality**, select from the following checked by default.
  - Slack Chat
5. Click **Apply**.

**Note:** If the Slack token is changed, it must be updated in Accolade.

## Replacing the Accolade Logo and Adding Header or Footer Text

Administrators can configure the look and feel of Accolade to be more in line with company standards by modifying or replacing or adding the following items:

- The Accolade logo.
- Text that displays at the top of the application window above the main menu bar, or at the bottom of the page. This may be corporate or legal directives, or any text all employees in your company need to see.

It may be necessary to clear the cache in the web browser to see the new graphics after completing the steps below.

**Notes:** If you are using the preview version of Accolade, you may also upload a logo to display.

**To replace the Accolade logo:**

1. Navigate to **System > Settings** from the **System** menu.
2. Choose the **Parameters** tab.
3. Select **General Parameters**.
4. Click the **Search** icon next to **Website Logo Image** or **Preview Website Logo Image** to begin the process of uploading a new logo.
5. Choose the desired logo image file.
6. Upload file.

**Notes:**

- Accepted file types include: .bmp, .dib, .gif, .jpg, .jpeg, .jpe, .jfif, .png, and .svg.
- Recommended dimensions are up to 250 px width by 30 px height. An image that exceeds these dimensions will be resized automatically .
- Upon uploading, the logo will be saved. To see the newly saved logo in your General Parameters section, refresh the page.

**To add text to top or bottom of the application window:**

1. Open the Accolade Administration Console on the application server.
2. Click **Standard Parameters** in the Navigation pane.
3. In the **Category** field, select **System** and select the **Show Advanced** option.
4. Set the **Accolade Page Header Text** or **Accolade Page Footer Text** parameters as HTML or text that displays accordingly on all Accolade pages.
5. Click **Apply** to save your changes.

**Notes:**

- If your company uses a load balanced configuration, you will need to restart the Accolade Cache Service and reset IIS on all application servers in order to see the logo changes.

## Translating Accolade Text into Another Language



Accolade provides the flexibility to translate the text displayed in the application into several different languages. When a user selects the language in which to view the application in their user profile, the application uses the translation entered for that language. You can add languages as required for your implementation.

- 💡 Use the procedure below to configure text, such as display messages, window title, and menu names. Select the appropriate language and enter the customized phrasing.

Translatable text includes:

- Field names
- Page titles
- Menu names
- Messages and notifications

The display and entry of dates for each user within Accolade is determined by the date format set in each user's account or their personal selection in their user profile, *not* by the language selection.

- 💡 To ensure the names used in notifications, reports, some configuration pages, and some other locations are consistent with your translation or modifications, you must also enter the new names in the entity names and/or class terminology pages.

---

**Important!** Terminology and language changes will require you to restart the Accolade Cache Service and reset IIS on all application servers in order to display the changes. Be mindful when making these updates, as users will temporarily be unable to access Accolade during the reset process.


---

To import or export Accolade text, see [Importing and Exporting Languages](#) for more information on creating and using the import process.

#### To translate Accolade text:


1. On the **System** menu, select **Configuration > Languages**.
2. In the **Language** field drop-down, do one of the following:
  - Select the language to which you want to translate.
  - Select **Add New** to add a language to the list, select the language to add in the New Language dialog box, and click **Add**.
3. *(Optional)* To narrow the list of translatable items, enter search criteria in the **Filter By** field and click **Filter**.

Only items with the criteria you enter display in the list. Leave the field empty to display all available translatable items. Note that some items may not be translatable.

 To find a specific term or phrase and replace one instance or all instances, use the **Find What** and **Replace With** fields to complete a search and replace throughout the translatable items.

4. In the **Current Value** column, enter the translated text, or the text to use instead of the text in the **Default Value** field.

Note that some items may display as read-only depending on your access group admin rights

 To create multi-line text strings, press **Enter** to start the next line.

5. To finish work on a string, click outside the **Current Value** field that you are editing. Edited fields display highlighted to help you track the changes you have made.

---

**Important!** In text strings that include a token (for example, {0}) that inserts text into the string, you must include the token in the appropriate place in the translated version. The explanations in the **Required Tokens and Explanation** column indicate where to place the token.

Some tokens are enclosed in single quotes, ', or angle brackets, < >. These marks are part of the text, not part of the token. You can leave, remove, or change them, as appropriate.

---

6. Click **Apply** to save your changes.

**Notes:**

- If your company uses a load balanced configuration, you will need to restart the Accolade Cache Service and reset IIS on all application servers if you make any terminology or language changes.
- The content of the online help references the English translation of the default value for all the items listed above, and is not customizable or translatable at this time. The changes made to the entity names page (**System > Configuration > Entity Names**), the system language page (**System > Configuration > Languages**) or the class terminology page (**System > Configuration > Class Terminology**) will not currently change the references in the help content.
- Translatable options do not include text in Portfolio Optimizer or in the Portfolio Optimizer help.

## Replacing Accolade Terminology

Accolade contains several terms that you can update to better fit your industry and the terminology used within your company. For example, Accolade uses the default terms Stage and Gate to reflect the elements of the classic Phase Gate process model. However, your company may prefer the terms Phases and Milestones to indicate those components of the process.

Accolade provides the flexibility to use custom terms for the following items within the application:

- Assignment statuses, such as In Process or Not Started.
- Gate decisions, such as Go and Hold.
- Process entities, such as Stage, Gate, and Deliverable.
- Review decisions, such as Approve, Reject, and Decline.
- Review events, such as In Review, Approved, or Not Started.
- Accolade user role names, such as Project Manager or Process Designer.
- Workflow events, such as Started, Stopped, or Updated (if your company uses the Collaborative Workflow feature).
- The Accolade application name and Accolade menu items within the Accolade Office Extensions add-in applications.

To configure or translate system-wide items such as entire notification messages, see the Translating Text into Another Language topic in the online Help.

---

**Important!** Terminology and language changes will require you to restart the Accolade Cache Service and reset IIS on all application servers in order to display the changes. Be mindful when making these updates, as users will temporarily be unable to access Accolade during the reset process.

---

### To replace an Accolade term within the application:

1. On the **System** menu, select **Configuration > Entity Names**.
2. Expand the section that contains the names to change.
3. In the **Custom Name** column, enter the names for each item that you prefer to use.
4. Click **Apply** to save your changes.

Clicking **Apply** on this page saves your changes to all the parameter settings, not just custom names. Review your changes as necessary prior to clicking **Apply**.

5. Make the same updates within the system language page (**System > Configuration > Languages**) and/or the class terminology page (**System > Configuration > Class Terminology**).

To ensure the names used in notifications, reports, some configuration pages, and some other locations are consistent with your translation or modifications, you must also enter the new names in the system language and/or class terminology pages.

6. Restart the Accolade Cache Service and reset IIS on all application servers.

**To change the Accolade menu name in the Accolade Office Extensions add-in:**


1. On the **System** menu, select **Configuration > Entity Names**.
2. Expand the **Process Entity Names** section and update the name in the **Accolade** field.
3. Click **Apply** to save your changes.
4. On the **System** menu, select **Configuration > Languages** and make the same updates within the language file.

To ensure the names used in notifications, reports, some configuration pages, and some other locations are consistent with your translation or modifications, you must also enter the new name in the system language page.

5. Restart the Accolade Cache Service and reset IIS on all application servers.

**To change the Save to Accolade menu option in the Accolade Office Extensions add-in:**

1. On the **System** menu, select **Configuration > Languages**.
2. Select a language and filter by **Accolade**.
3. Find **Save To Accolade** in the list and enter the phrase to use instead in the **Current Value** column.
4. Click **Apply** to save your changes.
5. Restart the Accolade Cache Service and reset IIS on all application servers.

 To see the changes to the **Save To Accolade** menu, download a document from Accolade and open it in its respective application.

**Notes:**

- If your company uses a load balanced configuration, you will need to restart the Accolade Cache Service and reset IIS on all application servers if you make any terminology or language changes.
- The content of the online help references the English translation of the default value for all the items listed above, and is not customizable or translatable at this time. The changes made to the entity names page (**System > Configuration >**


**Entity Names**), the system language page (**System > Configuration > Languages**) or the class terminology page (**System > Configuration > Class Terminology**) will not currently change the references in the help content.

- Translatable options do not include text in Portfolio Optimizer or in the Portfolio Optimizer help.

## Configuring Class Terminology

Accolade provides the flexibility to configure text displayed in a project based on a process model. Administrators and Process Designers can make changes at the class level to project-related terms such as Project ID or Project Manager, which are applied to all process models in that class.

For example, your company may have a division where projects are called "Features" and the role of project leader is defined as a "Feature Owner". For process models that are used by this division, you can change the Accolade field Project Manager to display Feature Owner to match this role definition, to help users align company and Accolade roles and assignments.

-  Class terminology can be configured in all languages that are enabled in your implementation. When a user selects the language in which to view the application in their user profile, the application uses the configuration entered for that language.

Class configurable text includes project-related terms such as:

- Field names
- Page titles
- Menu names
- Confirmation messages

---

**Important!** Terminology and language changes will require you to restart the Accolade Cache Service and reset IIS on all application servers in order to display the changes. Be mindful when making these updates, as users will temporarily be unable to access Accolade during the reset process.


---

### To configure the terminology for a specific class:

1. From the **System** menu, select **Process > Classes** and select the class to edit.  
To narrow the class list, search by the class name, system name, or category.
2. Click the **Class Terminology** tab.
3. In the **Language** field drop-down list, select the language to which you want to make changes.


4. *(Optional)* To narrow the list of translatable items, enter search criteria in the **Filter By** field and click **Filter**.

Only items with the criteria you enter display in the list. Leave the field empty to display all available translatable items. Note that some items may not be translatable.

 To find a specific term or phrase and replace one instance or all instances, use the **Find What** and **Replace With** fields to complete a search and replace throughout the translatable items.

5. In the **Current Value** column, enter the translated text, or the text to use instead of the text in the **Default Value** field.

Note that some items may display as read-only depending on your access group admin rights

 To create multi-line text strings, press **Enter** to start the next line.

6. To finish work on a string, click outside the **Current Value** field that you are editing. Edited fields display highlighted to help you track the changes you have made.

---

**Important!** In text strings that include a token (for example, {0}) that inserts text into the string, you must include the token in the appropriate place in the translated version. The explanations in the **Required Tokens and Explanation** column indicate where to place the token.

Some tokens are enclosed in single quotes, ', or angle brackets, < >. These marks are part of the text, not part of the token. You can leave, remove, or change them, as appropriate.

---

7. Click **Apply** to save your changes.

## Configuring Terminology for Multiple Classes


The **System > Configuration > Class Terminology** page can also be used to view, edit, and export/import changes to terminology for multiple classes at once. See [Importing and Exporting Class Terminology](#) for more information on creating and using the import process.

### To configure the terminology for a specific class:

1. From the **System** menu, select **Configuration > Class Terminology**.
2. Click the **Class Terminology** tab.
3. In the **Language** field drop-down list, select the language to which you want to make changes.
4. In the **Class** field drop-down list, select the class to which you want to make the changes.


5. (Optional) To narrow the list of translatable items, enter search criteria in the **Filter By** field and click **Filter**.

Only items with the criteria you enter display in the list. Leave the field empty to display all available translatable items. Note that some items may not be translatable.

 To find a specific term or phrase and replace one instance or all instances, use the **Find What** and **Replace With** fields to complete a search and replace throughout the translatable items.

6. In the **Current Value** column, enter the translated text, or the text to use instead of the text in the **Default Value** field.

Note that some items may display as read-only depending on your access group admin rights

 To create multi-line text strings, press **Enter** to start the next line.

7. To finish work on a string, click outside the **Current Value** field that you are editing.

Edited fields display highlighted to help you track the changes you have made.

---

**Important!** In text strings that include a token (for example, {0}) that inserts text into the string, you must include the token in the appropriate place in the translated version. The explanations in the **Required Tokens and Explanation** column indicate where to place the token.

Some tokens are enclosed in single quotes, ', or angle brackets, < >. These marks are part of the text, not part of the token. You can leave, remove, or change them, as appropriate.

---

8. Click **Apply** to save your changes.

**Notes:**

- New language options must be first added to the system through the **System > Configuration > Languages** tab in order for the language to be available for configuration at the class level.
- If your company uses a load balanced configuration, you will need to restart the Accolade Cache Service and reset IIS on all application servers if you make any terminology or language changes.
- The content of the online help references the English translation of the default value for all the items listed above, and is not customizable or translatable at this time. The changes made to the entity names page (**System > Configuration > Entity Names**), the system language page (**System > Configuration > Languages**) or the class terminology page (**System > Configuration > Class**

**Terminology**) will not currently change the references in the help content.

- Translatable options do not include text in Portfolio Optimizer or in the Portfolio Optimizer help.

## Adding Custom Details Throughout Accolade

Create custom data fields, called extended fields, which can record data about deliverables, activities, resource pools, timesheets, and/or users. You can define the type of data recorded, indicate what the content should relate to, and specify whether the data applies to deliverables, activities, resource pools, timesheets, users, or some combination. Extended fields are also included in report contents.

If you synchronize and add Accolade users using Active Directory, you can define custom string fields within Accolade to map data into from Active Directory. See "[Synchronizing Users with Active Directory Overview](#)" on page 104 for more information about this option.

### To add an extended field:

1. From the **System** menu, select **Configuration > Extended Fields**.
2. Expand the section that contains the field type you want to define.


Each data type can have a maximum of ten fields in use. Select from the following options:

- **Date** - Creates date controls where you can select a calendar date.
- **List** - Creates single-select list boxes that you can populate either by a query or by entering the list items manually.
- **Long String** - Creates multi-line text boxes that accept numbers and letters.
- **Multi-Select List** - Creates multiple selection list boxes that you can populate either by a query or by entering the list items manually.
- **Number** - Creates number boxes that accept only numbers.
- **String** - Creates single-line text boxes that accept numbers and letters.



## 3. Modify the following columns to add an extended field with a control:

Field	Description
<b>Name</b>	Enter the name that identifies the content of the field. The name displays as the row or column label where the field displays.
<b>List Source</b>	<p><i>(for List and Multi-List fields only)</i> Create a query-based list or define a list manually.</p> <p>You define the options for the list much like you do for <a href="#">a list or multi-select list metric</a>.</p> <ul style="list-style-type: none"> <li>To create a query generated list, select <b>Query</b> and select a query from the box. Click <b>Edit</b> to modify the query or click <b>Preview</b> to test it.</li> <li>To manually create a list, select <b>Defined List</b> and enter the list items separated by a pipe (   ) character, just as if creating a list for a list metric.</li> </ul> <p><b>Note:</b> To manually create a list, select <b>Defined List</b> and enter the list items separated by a pipe ( ) character, just as if creating a list for a list metric. Do not use spaces between the list item and the pipe character (a b c).</p>
<b>Active</b>	<p>Select one or more of the following options to make the extended field in the following:</p> <ul style="list-style-type: none"> <li><b>Activities</b> - Select the check box to make this field available in the <b>More Details</b> section within an activity.</li> <li><b>Deliverables</b> - Select the check box to make this field available in the <b>More Details</b> section within a deliverable.</li> <li><b>Pools</b> - Select the check box to make this field available when adding resource pools. List-type extended fields that are associated with pools can be used to filter resources on the Resource Editor page.</li> <li><b>Timesheets</b> - Select the check box to add this field to Timesheet Entry. See <a href="#">"Time Tracking Overview"</a> on page 414 for more information on using timesheets in Accolade.</li> </ul> <p>Resources and timesheets are available in optional features available for Accolade.</p>
<b>Users</b>	<p>Select one or more of the following options to define additional details when you create user accounts:</p> <ul style="list-style-type: none"> <li><b>Active</b> - Select to add this field to the User Admin page used to define user accounts.</li> </ul>

Field	Description
	<ul style="list-style-type: none"> <li>• <b>Required</b> - Select to require a value for this field when creating new Accolade users or updating an existing user.</li> <li>• <b>Searchable</b> - Select to add this field as a filter to the Select User dialog box. Date fields cannot be selected for user search. The <b>Maximum Searchable Extended Fields</b> system parameter defines the maximum number of fields that you can select for user search. The default value is five fields.</li> </ul> <p> <b>Create a report</b> using the Users subject to determine which users are missing values for required extended fields.</p> <ul style="list-style-type: none"> <li>• <b>AD Sync</b> - Select if you have Active Directory enabled and want to pull data from Active Directory to this extended field. This check box only displays if the Active Directory functionality is enabled.</li> </ul> <p>If the extended field is set to required and a value is not set for a user for the field in Active Directory, the user is set to inactive when the directory synchronization occurs.</p>
<b>Order</b>	Enter a number to define the vertical order of the field rows in relation to each other.


4. Click **Apply** to save your changes.

## Mapping Extended Field System Names

If your company uses extended fields, you may have the need to retrieve the related system names for use when importing data or for reporting purposes.

The general syntax for the system name is **ExtendedField<datatype><number>**, where number is the sequential number of the extended field. For example, in the Date Fields section, the first field is ExtendedFieldDate1, the second field is ExtendedFieldData2, and so forth.

Extended field system names are automatically assigned, and cannot be changed.

-  To view the extended fields mapping specific to your company's configuration, Sopheon recommends downloading the list of all fields using the Download option on the configuration page. Note that all fields will be downloaded, regardless of whether or not they are in use.

### Notes:

- To remove an existing field, clear the selected check boxes for the field.
- After a detail row has been added to a project, its data cannot be simply deleted from the project. If the row is completely changed in the extended field definition, its data remains in projects until a user deletes the data or enters new data.

## Defining Deliverable and Activity Details Display Options

Administrators and Process Designers can define which metadata fields are included when displaying deliverable and activity details and which information displays when initially opening a deliverable or activity. Use these options to show or hide fields that are not applicable in your process flow or to display information in the Summary pane or within More Details in deliverables and activities.

---

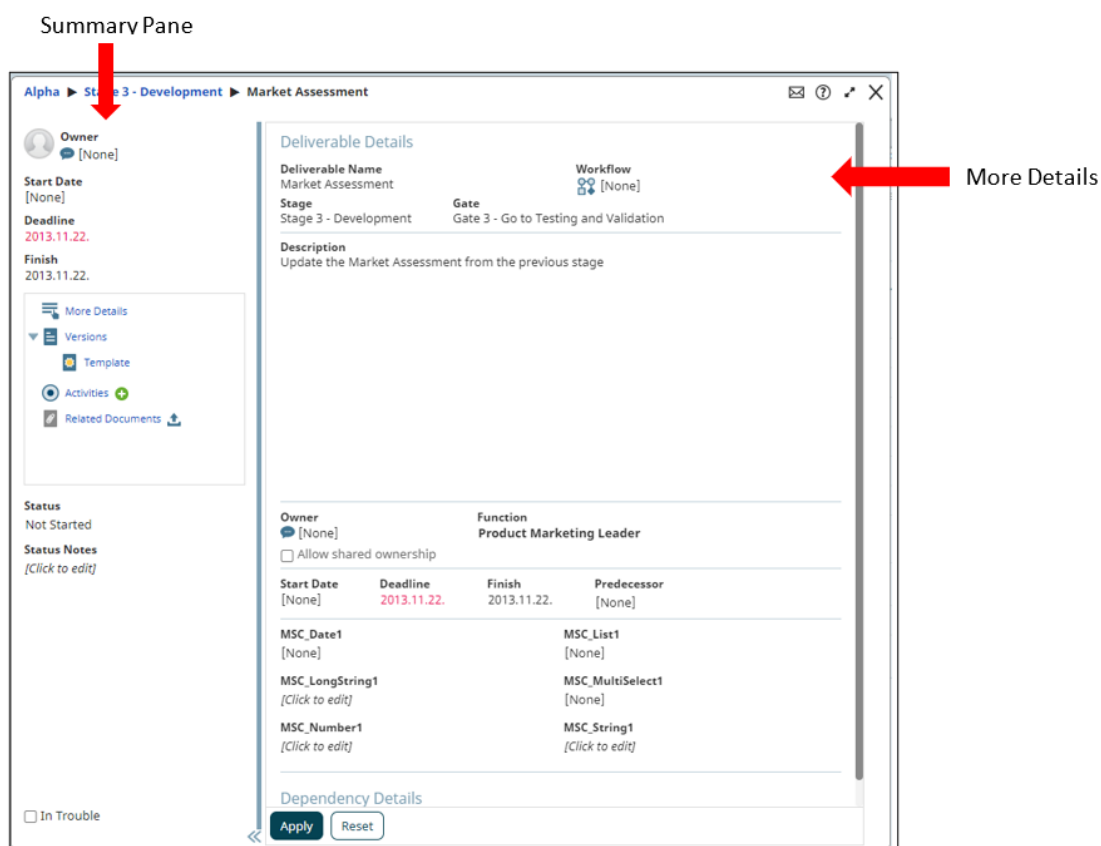
**Important!** The configuration settings define the display options for all deliverables and activities in all projects in Accolade.

---

### To define what options display in the Deliverable/Activity Details dialog box:

1. From the **System** menu, select **Configuration > Assignments**.
2. In the **Default Main Window** field, select what type of content to display when the Deliverable or Activity Details dialog box initially displays.
  - **Quick Grids or Versions** - Displays quick grids if they are available, or versions if the deliverable or activity has no quick grid assigned.
  - **More Details** - Displays the additional details about a deliverable or activity, which includes the [extended fields](#) defined to display for deliverables or activities and the options you set to include in More Details below.

3. In the Deliverable / Activity Data table, select which fields to display in either the **Summary Pane**, in **More Details**, both, or neither location.



As you make selections, be careful not to hide fields that are needed that cannot be updated elsewhere. For example, if your company has enabled the Allow Team Members to Share Assignments system parameter to enable collaborative documents, and you hide the Allow shared ownership from both the Summary pane and More Details, the assigned project manager or a Process Manager no longer has the means to make a document collaborative.

4. Click **Apply** to save your changes.

**Notes:**

- Clicking on the In Trouble check box for a Deliverable / Activity whose status is not In Progress, will then set it's status to In Progress.

## Controlling Uploaded File Types

Accolade uses a blocklist to prevent the upload of listed file extensions as a security measure. This blocklist, stored in the SQL table ACC\_DomainExtensionsProhibitedForUpload, specifies .exe files by default.

To have additional extensions added to this table for blocking, contact Sopheon Customer Support.

## Creating Project Link Types

Create project link types to express the different relationship types that can exist between projects. For example, your company may link technology projects to both the product they are applied to and to a market strategy component in your overall portfolio. Or, you may define relationships that include a dependency to indicate that one project must finish before another starts. Create project link types that indicate those relationships.

Administrators and Process Designers create the link types, which are available to Process Managers, Idea Managers, and Project Managers to create the actual link between projects. Links created between projects are viewable a project's Related Projects page, and in Portfolio Browser (if enabled) and Accolade Innovation Planning.


**Note:** If Portfolio Management components or Accolade Innovation Planning is installed, Accolade includes a **Child Relationship** link type (Hierarchy Link Default) that manages the parent-to-child relationships to create project portfolios. This link type uses a default **Link From Name** of **Contains** to establish a link from a parent project to a child project, and a **Link to Name** of **Member Of**, to establish links from a child project to a parent project. Use the **Child Relationship** link type to create a project hierarchy. Administrators and Process Designers can modify this type; however, it cannot be deactivated or deleted.

### To create a project link type:

1. From the **System** menu, select **Process > Link Types**.
2. Do one of the following:
  - **To add a new project link type** - Click **Add New** in the top right corner of the page.
  - **To edit an existing project link type** - Click the name of the link to edit.
3. Enter the following information to identify and describe the link type:

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

Field	Description
<b>Name</b>	Enter a name, up to 64 characters, which identifies the project link type. This is also the name that displays as the link label if the link has zero or two arrowheads.
<b>System Name</b>	Enter a unique, shorter name that identifies the link type in queries, reporting views, field codes, and other places in Accolade.  The name must be unique among link types and can contain only letters (English alphabet), numbers, and the underscore.
<b>Description</b>	Enter a description of the purpose or nature of the link type.  This description helps other users identify the link type throughout the system.
<b>Order</b>	Enter a number to specify the link type's place when it displays in a list of types. Lower numbered metrics display higher in the list.
<b>Restrict to These Roles</b>	Select the user roles that are required to create, edit and delete a link using this link type.  If restricted, only Process Managers, Idea Managers, and Project Managers that also have one of the selected user roles can create, edit, and delete links between projects using this link type. The link type is not available for other users without the assigned roles.  <b>Note:</b> These restrictions do not apply to automatic link type creation.
<b>Link From Name and Link To Name</b>	Some links can be visualized as pointing from one project towards another project. <ul style="list-style-type: none"><li>• <b>Link From Name</b> is the name of the link as it is described from the point of view of the "From" project in the link.</li><li>• <b>Link To Name</b> is the name of the link as it would be described from the point of view of the "To" project.</li></ul> For example, a link named "Component" might have a <b>Link From Name</b> of <b>Is Component Of</b> and a <b>Link To Name</b> of <b>Has Component</b> .  If a link is non-directional, or if it points both ways (bidirectional), then the <b>Link From Name</b> is likely the same as the <b>Link To Name</b> .
<b>Process Model Mappings</b>	Define the process models available for the link type: <ul style="list-style-type: none"><li>• <b>From Process Models</b> - Select the process models that this link can link from. The link type is only available in projects that use the selected model.</li></ul>

Field	Description
	<ul style="list-style-type: none"> <li>• <b>To Process Models</b> - Select one or more process models that this link can link to. Only the projects that use one of the selected process models are available to select when creating a project link. To make the link type available to all projects, select all the process models in the list.</li> <li>• <b>Max Project Links</b> - Enter the maximum number of parent links that a project link can have that is created using the From/To process model combination. If project links exist before setting this value, and are in violation of the number set here, you must manually remove the links between projects to respect the max value before creating any additional links (either manually or using automatic link rules).</li> </ul> <p>Check <b>Map all process models to all process models</b> to link any process model to any process model.</p> <p>To make the link type available to link from multiple models, click  to add an additional rule.</p>
<b>Active</b>	<p>Select the check box when this link type is ready for use.</p> <p><b>Note:</b> The <b>Child Relationship</b> link type cannot be deactivated.</p>

\* Read-only in the Child Relationship link type.

4. Enter the display characteristics for the lines drawn between projects in Portfolio Browser and Innovation Planning.

Field	Description
<b>Line Color</b>	Select the color of this link's displayed line.
<b>Arrow Direction</b>	<p>Select the direction an arrow points between projects for this link.</p> <p>If this link points in one direction, the direction should be coordinated with the <b>Link From Name</b> and <b>Link To Name</b>. An arrow that points in one direction has the perspective of the project at the base of the arrow. For example, an arrow that points towards the "link from" project has the perspective of the "link to" project and displays the "link to" name in the browser, and vice versa.</p>

Field	Description
	The natural configuration of a link with one arrow would be with the arrow pointing toward the To project in the link. Such a link would display the <b>Link From Name</b> in the Portfolio Browser.

5. In the **Dependency Type** field, select the relationship type if the link type represents a dependent relationship based on project start and finish.
  - **None** - No dependency.
  - **Start - Start** - The source project must start before the target project can start.
  - **Finish - Finish** - The source project must finish before the target project can finish.
  - **Finish - Start** - The source project must finish before the target project can start.
  - **Date - Date** - A date in the source project must be before a date in the target project.

Planners creating links between elements in Accolade Innovation Planning using a **Date - Date** link type can select a date, such as the project's start date, end date, a gate date, or a date metric available within the element, when creating the link or relationship. To show relationships between milestones the start and end milestone metrics must first be set as visible in Roadmapping. To set milestone metrics as visible open the data type from the element type menu on the left and click on the diamond next to the relevant metric.

For project links created in the project pages and through Accolade Portfolio Optimizer, the link is created using a set of default dates defined in the link type configuration. Select the default dates from the **Source Default Date** and **Target Default Date** fields that are used for these links.

**Note:** If you are updating an existing link type, links created prior to the change maintain their settings.

6. In the **Manage Links** type field, select the starting point that a link can be created, edited, or deleted from. See [Link Type Examples](#) below. Note that these restrictions do not apply to automatic link type creation.
7. Click **Create** to create the new link type or **Apply** to save changes to an existing link type.

## Link Type Examples

The following sections provide example of potential link type configurations. The following examples assume the user has the correct user roles to create projects using the described links.

### Example 1

Consider the following link type configuration:



			Mappings	
Link From Name	Link To Name	Manage Links	From Process Models	To Process Models
Contains	Member Of	From --> To	NPD Portfolio Model	NPD Model

Project A uses the NPD Portfolio Model and is considered the parent project in a parent/child relationship.

From Project A, the user can:

- Create a link to projects that use the NPD Model.
- Select **Contains** as the link type name.
- Edit or delete the link from Project A.

The user cannot create the link from a project that uses the NPD Model, because the **Manage Links** field is set to **From --> To**.

**Example 2**

Consider the following link type configuration.

			Mappings	
Link From Name	Link To Name	Manage Links	From Process Models	To Process Models
Contains	Member Of	To --> From	NPD Portfolio Model	NPD Model

Project B uses the NPD Model and is considered a child project in a parent/child relationship to Project A.

From Project B, the user can:

- Create a link to Project A.
- Select **Member Of** as the link type name.
- Edit or delete the link from Project B.

The user cannot create the link from a project that uses the NPD Portfolio Model, because the **Manage Links** field is set to **To --> From**.

**Example 3**

			Mappings	
Link From Name	Link To Name	Manage Links	From Process Models	To Process Models
Contains	Member Of	Both Directions	NPD Portfolio Model	NPD Model

Project A uses the NPD Portfolio Model and is considered the parent project in a parent/child relationship. Project B uses the NPD Model is child of Project A.

From Project A, the user can:

- Create a link to projects that use the NPD Model.
- Select **Contains** as the link type name.
- Edit or delete the link from Project A.

From Project B, the user can:

- Create a link to Project A.
- Select **Member Of** as the link type name.
- Edit or delete the link from Project B.

The user can create the link from either side of the link relationship, because the **Manage Links** field is set to **Both Directions**.

**Notes:**

- To delete a link type, display the link type and click **Delete**. Any existing links are that use the type are removed from projects.
- Innovation Planning and Roadmapping are optional Accolade components that you may not have access to. To implement these solutions, contact [Sopheon Customer Support](#).

## Creating Links to Accolade Items

Create links that display in the Accolade menu bar that point directly to deliverables, activities, reports, and pages within Accolade. Use these links as short cuts to areas that you or users access most often. Similar to creating a favorites list in a web browser. Users can define their own links in their profiles, and Administrators can assign links globally or per user in user accounts.

You can create links to Accolade items in one of the following ways:

- Navigate to a page or item within Accolade, copy the URL in the browser Address field, and paste it when creating links.
- Navigate to a page or item within Accolade and bookmark the page in the web browser.
- Creating links using the formats described below that reference IDs within the Accolade database.

The advantage of creating links using the formats described below is that if Sopheon changes the URL format in a future release, the reference IDs to the data in the database does not change. Therefore, the link references remain intact, even if the web page address to reach a particular page changes.

When creating a link using the link formats below, replace the <website URL> with the URL of the Accolade website, which is typically the URL to the server, and replace later segments in < > with the object IDs from your database. The < > symbols are not included in the link.

- If the website has a port number other than the default of 80, the port number must be included in the <website URL> portion of the link. For example, <http://MyServer:443/?P=DOC&PID=242&DID=12>
- To determine the values of the website URL and of the system IDs such as DID, (deliverable ID), navigate to the document or page in Accolade and note the IDs displayed in the web browser's Address bar.


 Example


<http://MyServer/?P=DOC&PID=242&DID=12>


This link when added a user link or a global link creates a link to:

- A deliverable on a server named MyServer.
- In a project with an ID of 242.
- With a deliverable ID of 12.

Use the following formats when creating links to items within Accolade:

Link Type	Description	Format and Example
Deliverable Details	Links to the Deliverable Details dialog box for the deliverable specified.	<p>&lt;website URL&gt;/?P=DD&amp;PID=&lt;project ID&gt;&amp;DID=&lt;deliverable ID&gt;</p> <p><b>Example:</b> <a href="http://MyServer/?P=DD&amp;PID=14&amp;DID=25">http://MyServer/?P=DD&amp;PID=14&amp;DID=25</a></p>
Deliverable Document	Links to the Deliverable Details for the deliverable specified, and opens the Open/Save dialog box for a deliverable version.	<p>&lt;website URL&gt;/?P=DOC&amp;PID=&lt;project ID&gt;&amp;DID=&lt;deliverable ID&gt;</p> <p><b>Example:</b> <a href="http://MyServer/?P=DOC&amp;PID=14&amp;DID=25">http://MyServer/?P=DOC&amp;PID=14&amp;DID=25</a></p> <p> Only use this link type if there is currently a version of the deliverable.</p>

Link Type	Description	Format and Example
Deliverable Version Details	Links to the deliverable version detail.	<p>&lt;website URL&gt;/?P=DVD&amp;PID=&lt;project ID&gt;&amp;DID=&lt;deliverable ID&gt;&amp;DVID=&lt;version ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=DVD&amp;PID=14&amp;DID=25&amp;DVID=2</p>
Deliverable Online Form	Links to the online form defined for the specified deliverable.	<p>&lt;website URL&gt;/?P=FRM&amp;PID=&lt;project ID&gt;&amp;DID=&lt;deliverable ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=FRM&amp;PID=3&amp;DID=74</p>
Activity Details	Links to the Activity Details dialog box for the activity specified.	<p>&lt;website URL&gt;/?P=AD&amp;PID=&lt;project ID&gt;&amp;AID=&lt;activity ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=AD&amp;PID=158&amp;AID=7</p>
Activity Document	Links to the Activity Details and opens the Open/Save dialog box for an activity version.	<p>&lt;website URL&gt;/?P=DOC&amp;PID=&lt;project ID&gt;&amp;AID=&lt;activity ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=DOC&amp;PID=158&amp;AID=7</p> <p> Only use this link type if there is currently a version of the activity.</p>
Activity Online Form	Links to the online form defined for the specified activity.	<p>&lt;website URL&gt;/?P=FRM&amp;PID=&lt;project ID&gt;&amp;AID=&lt;activity ID&gt;</p> <p><b>Example:</b> http://Online Forms/?P=FRM&amp;PID=3&amp;AID=1</p>
Related Document	Links to the Related Document details for the specified document.	<p>&lt;website URL&gt;/?P=DOC&amp;PID=&lt;project ID&gt;&amp;RFID=&lt;related document ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=DOC&amp;PID=62&amp;RFID=22</p>
Gate Document	Links to the Gate Document details for the specified document.	<p>&lt;website URL&gt;/?P=DOC&amp;PID=&lt;project ID&gt;&amp;GDID=&lt;gate document ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=DOC&amp;PID=257&amp;GDID=2</p>

Link Type	Description	Format and Example
Initial Project Page Specified in a Model	Links to the page that was set in the model as the initial page to display when opening a project that uses that model.	<p>&lt;website URL&gt;/?P=PH&amp;PID=&lt;project ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=PH&amp;PID=78</p>
HTML Report	Links to the display of the specified HTML report.	<p>&lt;website URL&gt;/?P=HRPT&amp;RPTID=&lt;report ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=HRPT&amp;RPTID=12</p>
MS Excel Report	Links to the download of an MS Excel Report.	<p>&lt;website URL&gt;/?P=XRPT&amp;RPTID=&lt;report ID&gt;</p> <p><b>Example:</b> http://MyServer/?P=XRPT&amp;RPTID=33</p>
Single Idea Form	Links to an idea form, rather than to the Submit Idea page.	<p>&lt;website URL&gt;/?P=SI&amp;IID=&lt;idea model's ID&gt;</p> <p><b>Example:</b> "http://MyServer:91/?P=SI&amp;IID=6"</p> <p> The default port site for the Idea web site is 91.</p>

**Notes:**

- As an Administrator, it is possible to create a URL that a user cannot follow because they do not have access to the page due to project security rights or role assignments. In that situation, a new browser window or tab opens, and the user is prompted to log in, and the log in fails.
- To create a link directly to an idea form, the form the link calls must be identified as an idea deliverable for its model.

## Company Currencies Overview

Accolade uses the following currency types:

- **Corporate Currency** - The currency in which your company keeps its financial records and conducts corporate transactions. This currency is typically set once during installation.
- **Project and Report Currencies** - All currency values are stored in terms of the corporate currency. However, you may have multiple offices and projects within your company that track costs, estimates, and other financial information in the project's local currency. To enable Accolade to convert back and forth between the corporate currency and the project currencies, for example, in project-level reports, create a conversion table containing the conversion factors for each currency you use.

If all projects use the corporate currency as their local currency, you do not need to create a conversion table.

### Defining the Currencies Used in Your Company

The currency your company uses for financial records and corporate transactions is your company's base currency, or your corporate currency. Your company may have multiple geographic locations and thus may do business in currencies other than the corporate currency. If your company conducts business in other currencies, use one of the methods below to define the currency conversion for projects and reports.

Use the [ConvertToCorporateCurrency calculation function](#) to convert project currencies, metric values, or integer values to the corporate currency. This is the recommended method to convert project currencies and other values to the corporate currency.

- 💡 Use the **Currency Symbol** system parameter to update the currency symbol that displays when creating and viewing charts and online reports.

### Currency Method 1 - Date-Specific Currency Conversions

- 💡 The currency configuration method described below references exchange rates on specified dates, and is the recommended method to define project currencies.

#### To define date-specific currency conversions:

- Create a reference table that contains the date-specific exchange rates for the currencies your company uses. As exchange rates change, the reference table manager can add additional rows to subsequent versions of the table, while still preserving the exchange rates for prior dates.
- Create a list metric that contains the currencies available, such as Euro and USD, and add that metric to the appropriate process models for selection in a project.

- Create a calculated metric that performs the currency conversion. Use this metric for display in projects and reports that use a currency other than the base currency.

**To create the reference table that contains the date-specific exchange rates:**

1. Create a spreadsheet file that includes the following columns:
  - Date
  - One column for each currency in use, for example EUR, USD, and CAN.  
Reference the **ANSI 4217 Currency list <version>.xlsx** file available on the [Base Templates Reference Page](#) for currency codes, as needed. Do not modify the codes. Selected codes should be identical to codes found in the ISO 4217 currency standard.
2. Within the file, enter the calendar date, and the multipliers for each currency in the file:
  - Enter **1** in all rows for the base currency, as this currency is not converted.
  - For each remaining currency, enter the appropriate multipliers for the exchange rates on that date.
3. Save the spreadsheet file.
4. [Add a reference table](#) to Accolade using a name that identifies it as the table that contains the currency exchanges, for example, Currency. Select the saved file in the **Filename** field.
5. Click **Create** to save the reference table.

**To create a list metric that contains the currencies available to projects:**

1. From the **System** menu, select **Content Sources > Metrics**.
2. Click **Add New** and create the basic metric as described in ["Creating Metrics" on page 117](#), selecting **List** in the **Data Type** field.  
Provide a display and system name that identifies the metric as a project-level selection. For example, **ProjectCurrency**.
3. In the **List Source** field, enter each currency available for selection in a project as an item in the list. See ["Creating Single and Multi-Select List Metrics" on page 125](#).
4. Select the **Active** check box when the metric is ready to use in projects.
5. Click **Create** to create the metric.
6. Click the **Models** tab and associate the metric with the process models used for projects that require a currency selection.  
Ensure that the metric is set to Edit on at least one page so it can be set in a project.
7. Click **Apply** to save your changes.

**To create a calculated metric that performs the currency conversion:**

1. From the **System** menu, select **Content Sources > Metrics**.
2. Click **Add New** and create the basic metric as described in ["Creating Metrics" on page 117](#), selecting **Number** in the **Data Type** field.

Provide a display and system name that identifies the metric as the currency conversion calculation. For example, **ProjectCurrencyConversion**.

3. In the **Calculated Expression** field, create an expression that references the reference table you added above, and the project currency metric.

**Example**

Consider the following calculation:

```
ReferenceTable('Currency', '9/1/2016' ,{*Metric:ProjectCurrency*})
```

This calculation references the exchange rate provided in the Currency reference table for 9/1/2016 for the currency selected in the ProjectCurrency metric in the project.

4. Select the **Active** check box when the metric is ready to use in projects.
5. Click **Create** to create the metric.

Use this metric in other calculations, as necessary.

**Currency Method 2 - General Currency Conversions and Corporate Currency System Parameter**

**Note:** The currency configuration method described below is also an acceptable way to configure currencies; however, it does not provide a date-specific reference for a currency exchange rate. If the reference table that defines the exchange rates is updated, all references to the table are also updated, possibly providing an inaccurate conversion for a project.

**To define currency conversions using the Corporate Currency parameter and a general conversion table:**

- Set the Corporate Currency system parameter. The corporate currency is typically set during installation. You can verify the currency setting and set a currency, if necessary.
- Create a reference table using the **ANSI 4217 Currency list <version>.xlsx** base template available on the [Base Templates Reference Page](#) to store the currency exchange rates.

**To select a corporate currency:**

1. On the Accolade application server, open the Administration Console.
2. Click **General Parameters** and verify the current corporate currency setting in the read-only **Corporate Currency** parameter.



3. If a currency is not set, click **Currency Configuration** in the Navigation pane.
4. Select the currency to set as the corporate currency and click **Apply**.

---

**Important!** If you change the existing corporate currency if one displays in the **Corporate Currency** parameter, you must manually modify the conversion factors for projects and reports and repair any reports that use the previous currency.

---

#### To create the reference table that contains the exchange rates:

**Note:** Ensure that the corporate currency is set as described above prior to defining the currency conversions.

1. Save the **ANSI 4217 Currency list <version>.xlsx** base template to your computer using a file name that identifies it as the currency conversion file.

Ensure that the master **ANSI 4217 Currency list <version>.xlsx** file is kept in a safe place, such as the Template Library, with no modifications to it.

2. Open the saved file and delete the currency rows your company does not need.

Do not change the column headings in the **ANSI 4217 Currency list <version>.xlsx** template file or the files you base on it. Doing so breaks the currency conversion macro in the **Currency Report Template <version>.xltn** template file and in reports based on it.

Do not modify the codes in the **Currency Codes** column. Selected codes must be identical to codes found in the ISO 4217 currency standard. You can change the currency names; however, you must also modify the names in any reports that use the name as a filter.

3. In the **Conversion Factor** column, enter the multipliers for each currency:
  - In the currency row of the corporate currency, enter a multiplier of **1**, as this currency is not converted.
  - For each remaining project currencies, enter the appropriate multipliers to convert the currencies.
4. In the **Format 1** and **Format 2** columns, enter the primary and secondary display formats when the currency is included in Office documents using Accolade field codes.

The **Number Format** column when [adding a reference table](#) to Accolade governs how the conversions display. For example, having two formats allows the document designer, to display more decimal places for small amounts than for large amounts. See ["Custom Format for Number Metrics" on page 158](#).

Do not add additional columns to the left of existing columns in the worksheet. You can add additional columns to the right, if needed. The upper left corner of the table must be in cell A1 of the worksheet.

5. Save the spreadsheet file.
6. [Add a reference table](#) to Accolade using the system name **SGM\_Currency**, which indicates the file is the currency conversion file, and select the saved file in the **Filename** field.

Also set where currency is displayed and editable within a project using the metadata settings in a process model.

**Notes:**

- As currency exchange rates change, update the saved reference table file with the new currency exchange rates. Currency rates are updated in all open projects. The rate does not change in closed projects.

## Time Tracking Overview

Using the optional Time Tracking feature, Accolade users can enter time spent working on Accolade projects, to track the actual time spent versus the time originally planned for projects. Tracking the actual time team members have spent on a project allows comparisons between estimates for a project to the actual time worked, providing insight to improve planning strategies and execution over the course of future projects.

Project Managers have access to approve or reject a user's timesheet entries for the projects that they own, and Timesheet Approvers have access to approve time for resources that report directly to them but are assigned using resource pools.

## Setting Up Time Tracking

Before Accolade users can enter or approve time, Administrators and Process Designers must setup Timesheet Entry, including the following:

- [Defining the unit of measure used in timesheets.](#)
- [Defining custom Timesheet Entry fields.](#)
- [Granting access to Timesheet Entry.](#)
- [Defining which projects allow timesheet entry.](#)
- [Defining who can approve timesheet entries.](#)
- [Creating resource pools and assigning timesheet approvers.](#)

### Timesheet Units of Measure

The day fields within timesheets accept whole and partial numbers between 0 and 99.99. To ensure that each user is entering time in the same unit of measure, set your own definition about how users track their time. For example, are users to track time by hours or by the percentage of the day they spent working on a project. This is a standard you should set within

your projects and across your company. There is not a parameter or setting within Accolade that controls the unit of measure.

### Timesheet Tracking Fields

To properly record timesheet information, use Accolade extended fields to add additional data columns that are specific to your company's time tracking requirements to the Timesheet Entry page. For example, your company may require that time that is billable to a customer be tracked separately than non-billable time, or that time worked in a different state or country be tracked separately for tax filing purposes.


#### To add additional fields to the Timesheet Entry page:

1. From the **System** menu, select **Configuration > Extended Fields**.  
If necessary, [create an extended field](#), or expand the section that contains the field you want to make available in timesheets.
2. In the **Timesheet** column for each extended field to include, select the **Active** check box.
3. Click **Apply** to save your changes.

### Timesheet Entry Access

The Timesheet User role is required for a user to have access to Timesheet entry.

#### To grant access for timesheet entry:

1. From the **System** menu, select **Security & Groups > User Admin**.
2. In the **Users** list, click the name of the user to open the user details for editing .
3. Select **Roles and Rights** and select **Timesheet User**.
4. Click  to save your changes.

### Timesheet Project Availability

Your company may have projects that you include in Accolade that do not have time tracked against them. You can restrict timesheet entry at the class level, or at the project level.

- **Class Level** - Process Designers and Administrators can define which classes allow timesheet entry for the projects created for models within that class. Only projects within a class that allows timesheet entry are available for selection within users' timesheets. Classes are set to be included in Time Tracking by default.
- **Project Level** - At the individual project level, Process Managers and the assigned project manager can select whether the project is available for all timesheet users, only those on the team, or not available at all for timesheet entry. The entry selected is saved with the project team for use in other projects. Projects are set to be available to all timesheet users by default.

**To define a class to allow timesheet entry:**


1. From the **System** menu, select **Process > Classes**.
2. Click the name of the class you want to edit or [create a class](#).
3. In the class definition, select **Include in Time Tracking** to include projects within this class in timesheets.  
Clear the check box if projects in this class do not require time tracked to them.
4. Click **Apply** to save your changes.

**Timesheet Approval Access**

The Timesheet Approver user role is required for a user to be assigned to a resource pool as its timesheet approver. Users assigned as the Timesheet Approver in a resource pool approve all timesheets for users within that pool.

**Note:** Assigned Project Managers have access to approve time for their projects without the addition of the Timesheet Approver role.

**To assign users the Timesheet Approver role:**

1. From the **System** menu, select **Security & Groups > User Admin**.
2. In the **Users** list, click the name of the user to open the user details for editing .
3. Select **Roles and Rights** and select **Timesheet Approver**.
4. Click  to save your changes.

**Notes:**

- The **Weekly Start Day** system parameter determines the day of the week on which a time period starts. This parameter is set so a time period starts on Sunday and ends on Saturday. If you require a different time period start day, contact [Sopheon Customer Support](#).
- Time Tracking is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).


**Creating Resource Pools for Time Tracking**


Resource Pools are groups of similar resource types, or groups of resources that report to a single person for time tracking purposes. Administrators and Resource Pool Administrators can create and modify resource pools. How you group your resources into pools and how you manage your resource pools depends on the processes defined in your organization. For time tracking purposes, define resource pools and add resources to those pools based on who approves the timesheet for the users that belong to the pool.

If you use Time Tracking and Resource Planning, you can use the same pools for timesheet approval as you use for resource planning purposes.

**To create a resource pool for time tracking:**

1. From the **Resource** menu, select **Pools**.
2. Do one of the following:
  - **To create a new pool** - Click **Add Pool** in the upper right corner of the page.
  - **To modify an existing pool** - Click the name of the pool to open it for edition.
3. Complete the following information about the pool:

Field	Description
<b>Name</b>	Enter a name, up to 64 characters long, which identifies the pool.
<b>Active</b>	Select this check box if the pool is ready to use for time tracking.
<b>Security Lists</b>	If security lists are in use, select items in every list to specify which Pool Administrators can add resources to this pool if it does not have an owner.
<b>Unit of Measure</b>	Enter the units in which this resource is counted for Resource Planning.  The unit of measure you select here does not need to match the unit of measure that users enter their time in timesheet entry. Timesheet entry is based on your company's internal, decided upon convention.
<b>Timesheet Approver</b>	Click  to select the user that approves all timesheets for resources within the pool.  To filter the list of users, enter one or more search criteria to filter by name, login name, email address, function, or extended field. <ul style="list-style-type: none"> <li>• Clicking <b>Select current user</b> will assign the role to the current user (if they have the appropriate rights).</li> <li>• Selecting a <b>Function</b> in the drop-down will display available users that are assigned to the function. The current selection defaults to the function to which you are assigning a user, however depending on the project configuration, you can assign any user.</li> <li>• Clicking the <b>Show advanced filters</b> check box displays or hides the additional filter options.</li> <li>• Clicking <b>Clear</b> removes the current user assignment and displays <b>[None]</b> to indicate that no user is assigned.</li> </ul>

Field	Description
	<p>If a pool does not have an assigned Timesheet Approver, timesheets for users within that pool are not sent through the timesheet approval process. If a resource pool does not have a user selected here, timesheets for users within that pool do not require Timesheet Approver approval.</p> <p> Only users assigned the Timesheet Approver user role are available for selection.</p>
<b>Extended Fields</b>	<p>If one or more extended fields have been configured for resource pools, select the appropriate values for this pool. Fields are used to identify pool contents on the Resource Pools page.</p> <p><a href="#">Extended fields</a> must be set to apply to resource pools. If extended fields are set only for timesheets, the fields do not display here.</p>

4. Click **Create** to create the pool or **Apply** to save changes to an existing pool.

**Notes:**

- If security lists are enabled, Administrators can create or modify a pool with any security setting, but a Resource Pool Administrator can only create or modify pools that the Pool Administrator can access.
- Resource Pool Administrators can only assign security to a pool to which they have security access. Administrators can assign any item in a security list to a new pool.
- Resource Planning is an optional Accolade component that you may not have access to. To implement this solution, contact Sopheon Customer Support.
- Time Tracking is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).

## Enabling Time Tracking for Projects


Your company may have projects that you include in Accolade that do not have time tracked against them. You can restrict timesheet entry at the class level, or at the project level.

- **Class Level** - Process Designers and Administrators can define which classes allow timesheet entry for the projects created for models within that class. Only projects within a class that allows timesheet entry are available for selection within timesheets. Classes are included in Time Tracking by default. .

- **Project Level** - At the individual project level, Process Managers and the assigned Project Manager can select whether the project is available for all timesheet users, only those on the team, or not available at all for timesheet entry. The entry selected is saved with the project team if you choose to save the team for use in other projects. Projects are set to be available to all timesheet users by default.

The project team includes users assigned to the project on the project's **Team** page and those assigned as action owners in workflows within the project. Workflow action owners can access the project in Timesheet Entry if the project is available to timesheet entry and if they have approved or rejected a workflow action, or if the workflow is currently in process but they have not yet entered an action decision. This project access also applies to delegated action owners.

#### To set a project's timesheet availability:

1. Display the project and select the **Team**  page.
2. Expand the Manage Team panel and click **Settings**.
3. In the **Timesheet Availability** field, select one of the following options:
  - **Enable for all Timesheet Users** - The project is available for selection to all users who have the Timesheet User role.
  - **Enable for Team only** - The project is available for selection to only users who have the Timesheet User role who are members of the project team.
  - **Disable for all users** - The project is unavailable for selection within timesheet entry.
4. Click **Apply** to save your changes.

#### Notes:

- Time Tracking is an optional Accolade component that you may not have access to. To implement this solution, contact [Sopheon Customer Support](#).





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## Chapter 6

# Integrating with Other Applications

Accolade integrates with and links to other third party applications. This chapter includes information about integrating Accolade to the following:

- [Microsoft applications](#), such as Excel and Word.
- [Microsoft Project](#).
- [Your default email application](#).

In addition, Accolade provides a server-side API to allow third-party applications to programmatically access Accolade data and functions. For information about using the API, refer to the *API Reference* available at <http://<server name>/help/apihelp> or contact Sopheon Customer Support.

## Integrating with Microsoft Applications

The Accolade Office Extensions add-in provides an integration between Accolade and the desktop versions of Word, Excel, PowerPoint, and Outlook applications. Users can download documents directly to a Microsoft application, open and complete the necessary information, and then save the documents directly to an Accolade project without having to navigate back to Accolade. To enhance reporting functionality, Accolade Office Extensions allows users to create global or project-level reports in Excel that can be free-standing, or can be added to Accolade for reporting purposes.

The Accolade Office Extensions add-in must be installed on every user's computer in order to use any or all of the integration functionality. Additionally, if your company's Accolade users are using these applications as part of the Microsoft 365 suite, they must have the applications

- All reports created in Accolade as online reports, or using Accolade Office Extensions contain a custom MS Excel document property called ACCOLADE\_REPORT, which identifies the report as one with Accolade data. To help ensure sensitive data is not forwarded, use the filter options on your email server to prevent files that contain the custom property from being forwarded using email.

## Integrating With Microsoft Project

In addition, the Accolade Office Extensions add-in provides an integration that allows Microsoft Project Professional or Project Standard users to create Microsoft Project plan templates and use them to manage projects in conjunction with a related Accolade project, for example, when adding or removing team members, assigning documents, or creating new Project tasks.

- If you modify or install any third-party software that also communicates with Microsoft Project, you may need to modify certain Accolade parameters. Accolade integrates data using seven of the Microsoft Project custom text fields, Text24 through Text30. The add-in does not work properly if any other program is also trying to access those fields.
- In addition, Accolade's integration with Microsoft Project provides access to view projects in a Gantt view called the My Projects Gantt. To enable users to view the My Projects Gantt, ensure the feature is enabled and complete the following additional setup:
  - Assign the Planner user role to each user who needs access to the My Projects Gantt. The Planner role grants access to the menu that display the My Projects Gantt. For more information, see "[User Roles Reference](#)" on page 80.
  - Ensure the Innovation Planning Default class is set to **Include in Planning**, even if your company does not run Innovation Planning. For more information, see "[Creating Classes](#)" on page 232.

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**Important!** Use of the Microsoft Project functionality may require additional licensing. Contact Sopheon Customer Support for more information.

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For information regarding the specific features within a Microsoft application, see the Accolade online Help, and the Help available within from the Accolade menu in the Microsoft application.

## Selecting an Email Application

If you want to use any email application, such as IBM Notes (formerly Lotus Notes) or an application other than the Windows default (Outlook or Outlook Express), use the steps below to map the email application as the default within the browser used to view Accolade.

Complete the appropriate procedure below on each client machine.

### To map a default email application:

1. Ensure that the email application is installed as the default email system on the client machines of all users who want to use it for their email.
2. From the Windows Control Panel, select **Programs > Default Programs**, and then select **Set your default programs**.
3. In the **Programs** list, select the program to use as email and click **Set this program as default**.

To customize the list of file types opened with the program, select **Choose defaults for this program** and follow the onscreen instructions.

4. Click **OK** to save your changes.
5. If the email application you select has a 255 character limit in its mailto protocol, ensure that the **Enable Simple Email Support** system parameter is set to **1** (true) in the Administration Console.



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## Chapter 7

# Importing Project Data and Configuration

Accolade allows you to [import and update project data](#) by [creating data spreadsheets](#) for objects such as projects, resource information, and metrics for import into the system. Importing data is helpful when first implementing your system to transfer data and to get up and running quickly with Accolade, and can assist with mass project updates as business and information needs change.

In addition, Accolade allows you to export and import configuration components for movement from one Accolade environment into another Accolade environment. Importing configuration across environments can be helpful when your company uses a test environment for development of new models or components.

Accolade supports reference tables as spreadsheet, CSV, and XML files through the Reference Tables page, and through an [auto-loader service](#). The information and examples provided are in spreadsheet format.

## Importing Project and Resource Data Overview

Create, modify, or delete multiple projects in a mass import of project data into Accolade using two specially named reference tables. The import process creates and updates project data, but does not create new metrics, access groups, or models.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

The following types of data can be imported:

Data Type	Import Options	
	Spreadsheet without Reference Tables	Data/Config Reference Table Pairs (as spreadsheet, CSV, or XML)
Matrices		X
Projects		X
Project Links		X
Resource Pools		X
Resources		X
Resource Capacities		X
Resource Demands		X
Resource Demand Curves		X
Resource Demand Values		X
Metrics	X	
Users	X	

Importing project data requires the following steps:

- Create a file that contains the data to import (Data table).
- Map the data to fields in the Accolade database (Config table).
- Validate and run the data import.
- Troubleshoot the import as necessary.

Accolade supports reference tables as spreadsheet, CSV, and XML files through the Reference Tables page, and through an [auto-loader service](#). The information and examples provided are in spreadsheet format.

## Importing and Exporting Data Best Practices

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

- For reference table pairs that *import* data (Data/Config reference table pairs), every column referenced in the Config table must be present in the Data table, or the upload does not proceed. However, if there are extra columns in the Data table that are not referenced in the Config table, those columns are added to the new version of the reference table, but validation checks prevent the data from being imported.
- For reference table pairs that *update* data (Data/Config reference table pairs), if there is a change to the data, such as a metric column removed from the Data table, you must save the Config table containing that change to Accolade, before uploading the corresponding Data table. However, if the configuration remains unchanged, you can load multiple versions of the Data table in succession without the accompanying Config table.

## Creating Matrix Data Import Files

Import updates to metric values in a matrix into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_PMI\_**, which identifies the tables as reference tables that contain matrix update import data. Include only one matrix in a data/configuration file pair. Each matrix you want to update requires its own pair of reference tables.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Matrix Update Data to Upload (Data Table)


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**Important!** The matrix import deletes an existing matrix referenced in the data table and *completely replaces* it with the values you provide in the file. Therefore, you must provide values for all the rows in the matrix. If a row is missing or a value is left blank, the existing values in the matrix are replaced with a blank value on import.

---

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_PMI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the matrix data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	<p>Matrix updates must be in a file named <b>ACC_PMI_&lt;MatrixSystemName&gt;_Data</b>, where &lt;MatrixSystemName&gt; matches the &lt;MatrixSystemName&gt; in the matrix update configuration table and is unique within Accolade. For example, <b>ACC_PMI_ConsumerElectronics_Data</b>.</p> <p>There must be only one pair of tables that contain a given matrix system name. Accolade can contain multiple different data/config reference table pairs to update multiple matrices.</p>
<b>Rows</b>	Each row in the file represents a row in the matrix.
<b>Column Names and Position</b>	<p>Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation. Each metric within the matrix must be in a separate column, and the file must contain all the metrics within the matrix. Note that rich text metrics cannot be imported.</p> <p> Name the columns that contain metric data with their metric name and their data type. For example, ProjRisk_List, or Milestone_Date. This helps to identify the type of data required in the column.</p> <p>The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.</p>
<b>Data</b>	<p>The following columns and data are <b>required</b> for each matrix to update:</p> <ul style="list-style-type: none"> <li>• <b>Project ID or Metric Name</b> - Either the Project ID that displays on the project header, or a string metric that identifies the project.</li> <li>• <b>Process Model Name</b> - Depending on your system's configuration, this may display on the <b>Project Home</b> page.</li> <li>• One column for each non-calculated metric in the matrix. It is not necessary to include a blank column for a calculated metric included in the matrix.</li> </ul> <p>The data type of each metric has to match the data type of its reference table column in the Data table <i>except</i> that list metrics are in string type columns. The data type of a reference table column is created automatically when the first version of the table is created, but it can be edited by the table owner.</p>





Example

	A	B	C	D	E	F	G	H
1	ProjectCode	ProcessModelName	Metric1_Number	Metric2_Date	Metric3_List	Metric4_String	Metric5_MultiSelect	Metric6_LongString
2	ProjectA	modelName1	0	8/1/2020				
3	ProjectA	modelName1	1	8/1/2020				
4	ProjectA	modelName1	2	8/1/2020				
5	ProjectA	modelName1	3	8/1/2020				
6	ProjectB	modelName1	10	10/15/2020				
7	ProjectB	modelName1	11	11/1/2020				
8	ProjectB	modelName1	12	11/1/2020				
9	ProjectB	modelName1	13	1/1/2021				
10								
11								

Note the following in the example above:

- Each metric contained in the matrix contains its own column.
- The import updates the metric values in a single matrix (based on the data/configuration file name) that is updated in both Project A and Project B, with the values for the respective projects.

**Map the Matrix Data to the Accolade Database (Config Table)**

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_PMI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table, as needed.

Create the matrix configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The matrix update configuration must be in a file named <b>ACC_PMI_&lt;MatrixSystemName&gt;_Config</b> , where the <i>&lt;MatrixSystemName&gt;</i> matches the matrix updates data file and is unique within Accolade. For example, <b>ACC_PMI_ConsumerElectronics_Config</b> .  There must be only one pair of tables that contain a given matrix system name. Accolade can contain multiple different data/config reference table pairs to update multiple matrices.
<b>Rows</b>	Each row maps a column in the data table to a metric or a metadata item.
<b>Column Names and Position</b>	The matrix update configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> </ul>

Component	Requirements
	<ul style="list-style-type: none"> <li>• <b>Metric System Name</b> - Enter the system name of the metric whose column heading is in the same row.</li> <li>• <b>Project Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> <li>• <b>Unique Identifier</b> - Enter <b>TRUE</b> in the either the <b>ProjectCode</b> row or a row that contains a string metric that specifies which column in the data table contains the data that identifies the project in which to update the matrix values. Only one string metric can serve as the identifier for the import.</li> </ul>
<p><b>Accolade Metadata Names</b></p>	<p>Use the following metadata names in the <b>Project Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database:</p> <ul style="list-style-type: none"> <li>• ProjectCode</li> <li>• ProcessModelName - Required whether ProjectCode or a string metric is used.</li> </ul>

**EXAMPLE** Example

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

	A	B	C	D	E	F	G	H
1	ProjectCode	ProcessModelName	Metric1_Number	Metric2_Date	Metric3_List	Metric4_String	Metric5_MultiSelect	Metric6_LongString
2	ProjectA	modelName1	0	8/1/2020				
3	ProjectA	modelName1	1	8/1/2020				
4	ProjectA	modelName1	2	8/1/2020				
5	ProjectA	modelName1	3	8/1/2020				
6	ProjectB	modelName1	10	10/15/2020				
7	ProjectB	modelName1	11	11/1/2020				
8	ProjectB	modelName1	12	11/1/2020				
9	ProjectB	modelName1	13	1/1/2021				
10								
11								

	A	B	C	D
1	Export Column Name	Metric System Name	Project Metadata Name	Unique Identifier
2	ProjectCode		ProjectCode	TRUE
3	ProcessModelName		ProcessModelName	
4	Metric1_Number	Metric1		
5	Metric2_Date	Metric2		
6	Metric3_List	Metric3		
7	Metric4_String	Metric4		
8	Metric5_MultiSelect	Metric5		
9	Metric6_LongString	Metric6		
10				
11				
12				
13				

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The **Metric System Name** must match the metric system name exactly for the value to update.
- The names listed in the **Project Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.
- The **TRUE** setting in the **Unique Identifier** column indicates that project code is used to uniquely identify projects.

### Creating Project Data Import Files

To create or conduct mass edits on project data, import project data into Accolade. Before running the import, create two specially named reference tables that will create a file that contains the data to import and map the data to fields in the Accolade database. The reference table pair begins with **ACC\_PI\_**, which identifies the tables as reference tables that contain project import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

#### Create a File That Contains the Project Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_PI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the project data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

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**Important!** Enter all dates in mm/dd/yyyy format, and enter the decimal separator in numbers as a period (.).

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**Important!** In order to successfully import projects you must use the ProjectSecurityList System Name.

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Component	Requirements
<b>File Name</b>	Project data must be in a file named <b>ACC_PI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the project importer configuration table and is unique within Accolade. For example, <b>ACC_PI_ConsumerElectronics_Data</b> .

Component	Requirements
<b>Rows</b>	Each row contains a different project, and each project exists in only one row.
<b>Column Names and Position</b>	<p>Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.</p> <p>The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.</p>
<b>Data</b>	<p>The following column and data is <b>required</b> to create an imported project or to update an existing project:</p> <ul style="list-style-type: none"> <li>• <b>Project ID</b> - Either the <b>Project ID</b> displayed on the project header, not the system ID, or a string metric that is used to identify the project. No special characters or spaces are allowed. If the project code does not match any project on the importing server, the import creates a new project. If the project code does match, the data in the import is used to modify the matching project.</li> </ul> <hr/> <p><b>Important!</b> If project IDs for existing projects are calculated by a metric or created automatically by the <b>Auto-Generate Project IDs</b> system parameter, use a string metric as the unique identifier in the imported data. If you set the unique identifier to <b>Project Code</b> the projects import successfully, but create duplicate projects. Use a string metric as the unique identifier to avoid duplicating projects.</p> <hr/> <p>You can ensure that projects are added by giving them project codes that you are certain do not match those of any existing projects in Accolade, such as a, b, c, etc.</p> <p>Project Codes entered as numbers strip all leading and trailing zeros, unless you first import with a reference table of the same name without data that sets the project code to a <b>String</b> data type.</p> <p>The following columns and data are <b>required</b> to create an imported project, but <b>optional</b> when updating an existing project:</p> <ul style="list-style-type: none"> <li>• <b>Project Name</b> - The name, up to 64 characters long, that identifies the project's purpose. If the project name is generated using a calculated metric, this field can be blank and is not required.</li> <li>• <b>Model Name</b> - The name of the model the project follows</li> </ul>

Component	Requirements
	<p>for completion. You can update projects that use an in-active process model.</p> <ul style="list-style-type: none"> <li> <b>Access Group Name</b> - The name of the access group that determines which users have access to this project. The access group must already exist in Accolade, the import process does not create access groups.                     </li> </ul> <p>The following columns and data are <i>optional</i> when creating or updating projects:</p> <ul style="list-style-type: none"> <li> <b>Metrics</b> - Each metric field is in a separate column. When importing values for multi-select list metrics, enter each selection for the metric in a single cell in a pipe (   ) delimited list. For example, Value-A Value-B.                     </li> </ul> <p>The data type for each imported metric must match the data type of its reference table column in the Data table. List metrics are in string type columns. To set the data types of the reference table columns, see "<a href="#">Requirements and Considerations for Reference Tables</a>" on page 253. Rich text metrics cannot be imported.</p> <ul style="list-style-type: none"> <li> <b>Delete Project</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> to delete the project. All other values are treated as <b>No</b>.                     </li> <li> <b>Team Leader</b> - The login of the Accolade user that is assigned as the project's project manager. Only users with the Project Manager user role can be assigned as team leaders. If you create a project without designating a project manager, you can select one later.                     </li> <li> <b>Team Leader Can Manage</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> if the user in the <b>Team Leader</b> field also is given the rights to assign and replace team members on the project. All other values are treated as <b>No</b>.                     </li> <li> <b>Team Members</b> - The user login and system name of the function the user is assigned, using the following format: <code>&lt;domain&gt;\&lt;UserLogin1&gt;:&lt;systemNameFunction1&gt;</code>. Separate users with a pipe (   ) character to create a delimited list. If the colon is not specified, all text between the pipes (   ) is considered a user login.                     </li> <li> <b>Auto Migrate Rules</b> - The system name of the <a href="#">workflow containing rules to migrate a project to a different model</a>. The workflow does not need to be in a certain state or associated with a model. If the import contains projects with migrations, a slight delay in migrating the projects could occur after the import completes.                     </li> </ul>

Component	Requirements
	<ul style="list-style-type: none"> <li> <b>Enforce Project Security</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> if the team members and the project manager must have access to the project through access groups, security lists, or security profiles. All other values are treated as <b>No</b>.                      Any users that do not have the same security as the project are not added to the team. Existing users on projects that are being updated are removed accordingly.                 </li> <li> <b>Project Description</b> - Enter the project description.                 </li> <li> <b>Project Start Date</b> - Enter the project start date in mm/dd/yyyy format.                 </li> <li> <b>Metadata Fields</b> - Each metadata field is in a separate column. Enter <b>Yes, Y, True,</b> or <b>1</b> for metadata fields that are either on or off, such as <b>VisibleToReports</b>. See <a href="#">"Allowed Project Metadata" on page 437</a> for a list of allowed metadata.                 </li> <li> <b>Security Lists</b> - For the project's security list access, create a column for each security list in the system. For each project, enter the ID numbers of the project's selected security list items in a pipe delimited list that begins and ends with a pipe (   ) character. The pipes ensure that each security list column is created as a String type in the reference table.                 </li> </ul> <p>💡 If the lists were <a href="#">created manually</a>, the IDs can be found in the database. If the lists were <a href="#">created in reference tables</a>, the IDs are found in the ID column.</p>

 Example

	A	B	C	D	E	F	G	H	I	J	
	Project ID	Project Name	Model Name	Metric X	Metric Y	Metric Z	Access Group Name	Delete Project	Team Leader	Team Leader Can Manage	Team Members
1	111	ProjectA	GatedModel1				Root			Yes	company\jane.user:functionSystemNa
2	222	ProjectB	GatedModel1				Root			TRUE	
3	333	ProjectC	GatedModel1				Root				
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											

Note the following in the example above:

- The import includes the required information - project code, project name, model name, and access group name.
- The import does not delete any projects, because the **Delete** column is blank.
- The import does not add any **Team Leaders** (Project Managers) because the column is blank.
- The import adds user jane.user to ProjectA as a team member.

### Map the Project Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_PI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the projects configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The project configuration must be in a file named <b>ACC_PI_&lt;pair identifier&gt;_Config</b> , where the <pair identifier> matches the project data file and is unique within Accolade. For example, <b>ACC_PI_ConsumerElectronics_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of project data.
<b>Column Names and Position</b>	<p>The project configuration must have the following column names, from left to right as listed below:</p> <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metric System Name</b> - Contains the system name of the metric whose column in the data table is in the same row.</li> <li>• <b>Project Metadata Name</b> - Identifies the data in the data table whose name is in the same row.</li> <li>• <b>Unique Identifier</b> - Specifies the column containing the data that uniquely identifies the projects. The column can be either the metadata <b>ProjectCode</b> or a string metric. Only one string metric can serve as the identifier for the import. Enter <b>TRUE</b> in the row that contains the identifier column heading name.</li> </ul> <p><b>Important!</b> If project IDs for existing projects are calculated by a metric or created automatically by the <b>Auto-Generate Project IDs</b> system parameter, use a string metric as the unique identifier in the</p>

Component	Requirements
	<p>imported data. If you set the unique identifier to <b>Project Code</b> the projects import successfully, but create duplicate projects. Use a string metric as the unique identifier to avoid duplicating projects.</p> <hr/> <p>A unique identifier is required to run a successful import. If Accolade is set to auto-generate project IDs, use a string metric as the unique identifier in the imported data. New projects are created with an auto-generated ID.</p>
<b>Accolade Metadata Names</b>	<p>Use the metadata names as listed in <b>Allowed Project Metadata</b> in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database.</p>



**EXAMPLE** Example

Project ID	Project Name	Model Name	Metric X	Metric Y	Metric Z	Access Group Name	Delete Project	Team Leader	Team Leader Can Manage	Team Members
111	ProjectA	GatedModel1				Root			Yes	company\jane.user:functionSystemNa
222	ProjectB	GatedModel1				Root			TRUE	
333	ProjectC	GatedModel1				Root				

Export Column Name	Metric System Name	Project Metadata Name	Unique Identifier
Project ID		ProjectCode	TRUE
Project Name		ProjectName	
Model Name		ProcessModelName	
Metric X			
Metric Y			
Metric Z			
Access Group Name		AccessGroup	
Delete Project		DeleteProject	
Team Leader		TeamLeaderLogin	
Team Leader Can Manage		TeamLeaderCanManageTeam	
Team Members		TeamMemberLogins	
Auto Migrate Rules		AutoMigrateRules	
Enforce Project Security		EnforceProjectSecurity	
Project Description		ProjectDescription	
Project Start Date		ProjectStartDate	
Metadata X			
Metadata Y			
Metadata Z			

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The **Metric System Name** must match the metric system name exactly for the value to update.
- The names listed in the **Project Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.
- The **TRUE** setting in the **Unique Identifier** column indicates that project code is used to uniquely identify projects.

**Allowed Project Metadata**

Use the metadata names as listed in below the **Project Metadata Name** column of the configuration table to map the data to the appropriate locations in the Accolade database. Unless otherwise noted, if an item is missing or invalid, the import ignores the data and makes no updates in Accolade.

Column Name	Accepted Values	Additional Notes
ProjectCode	String	

Column Name	Accepted Values	Additional Notes
<b>ProjectName</b>	String	
<b>ProcessModelName</b>	Valid Process Model display name	
<b>AccessGroup</b>	Valid Access Group display name	
<b>DeleteProject</b>	Yes, Y, True, 1*	
<b>TeamLeaderLogin</b>	user login	As it displays for the user on the User Admin page.
<b>TeamLeaderCanManageTeam</b>	Yes, Y, True, 1*	
<b>AllowTeamMemberDeletion</b>	Yes, Y, True, 1*	
<b>TeamMemberLogins</b>	user login	<p>As it displays for the user on the User Admin page.</p> <p>Login and function combinations are in a pipe-delimited string:</p> <pre>&lt;domain&gt; \ &lt;UserLogin1&gt; : &lt;systemNameFunction1&gt;   &lt;domain&gt; \ &lt;UserLogin2&gt; :&lt;systemNameFunction2&gt;.</pre> <p>Invalid team member logins are skipped but the rest of the project is created.</p>

Column Name	Accepted Values	Additional Notes
<b>AutoMigrateRules</b>	Configured migration rule name	Values can be found on the workflow details page. The workflow must be checked as <b>Is Smart</b> with a migration rule.
<b>EnforceProjectSecurity</b>	Yes, Y, True, 1*	
<b>ProjectDescription</b>	Any	
<b>ProjectStartDate</b>	Date	
<b>ProjectEndDate</b>	Date	
<b>ProjectClosed</b>	Yes, Y, True, 1*	
<b>ProjectClosedNotes</b>	Any	Only updated if the project is closed.
<b>VisibleToReports</b>	Yes, Y, True, 1*	
<b>ExcludeFromLineUp</b>	Yes, Y, True, 1*	
<b>LastGateNumber</b>	Numeric	Requires LastGateDecisionName in the table.  <b>Important!</b> LastGateNumber and LastGateDecisionName changes can only be applied to current or future gates. If you are updating a project and the LastGateNumber is set to a gate that has already past, the

Column Name	Accepted Values	Additional Notes
		<p>import does not update the gate information.</p> <p>For example, you have an existing project that had gate decisions of Go for gates 1 &amp; 2, and is currently approaching gate 3. If your project import has a <b>LastGateNumber</b> of 2 and a <b>LastGateDecision Name</b> value of Conditional Go, the import does not update the changes for the gate 2.</p>
<b>LastGateDecisionName</b>	String	<p>Requires LastGateNumber in the table.</p> <p>Values are available on the <b>Configuration &gt; Entity Names</b> page.</p>
<b>IdeaSubmitterLogin</b>	user login	As it displays for the user on the User Admin page.
<b>IdeaSubmitterEmail</b>	String	Must be in a valid email format (with the @ and . in the address, for example, name@sopheon.com)
<b>IdeaSubmitterName</b>	String	
<b>NotifySubmitter</b>	Yes, Y, True, 1*	
<b>InTrouble</b>	Yes, Y, True, 1*	

Column Name	Accepted Values	Additional Notes
<b>InTroubleReason</b>	String	
<b>InTroubleNotes</b>	String	
<b>TeamLeaderChangeReason</b>	Event Reason Code	Event reason code is configured on the Event Reason List tab of the Class definition page.
<b>GateDate01, GateDate02,...GateDate20</b>	Date	Updates to gate dates through an import are considered manually entered dates for the project. If gate dates for a project are set using a metric defined in the model, any updates to the gate date through an import override the date set by the metric.  Each gate date must be represented in individual columns.
<b>ProjectCurrencyCode</b>	three character currency code value	Currency codes are configured using the currency reference table.
<b>ProjectSecurityList1...ProjectSecurityList 5</b>	Security List value ID	If security lists are disabled in your system, or you provide a security list that does not exist, the project is created without a security list designation.  To include more than one security list use a (   ) pipe character.

\* For any column that accepts **Yes, Y, True**, or **1**, 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**, or **1** are treated as **No** when you upload the spreadsheet.

**Notes:**

- If you want to use a saved team for projects created through the import process, these teams must be manually assigned on the project's Team page.

## Creating Project Link Data Import Files

Import project link data into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_PLI\_**, which identifies the tables as reference tables that contain project link import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Project Link Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_PLI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the project links data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	Project link data must be in a file named <b>ACC_PLI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the project links configuration table and is unique within Accolade. For example, <b>ACC_PLI_BabyCare_Data</b> .
<b>Rows</b>	Each row contains a different project link, and each project link exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each project link: <ul style="list-style-type: none"> <li data-bbox="630 1451 1351 1730">• <b>Link System Name</b> - The system name of the link type that this project link is based on. The <b>HierarchyLinkDefault</b> link type creates a project portfolio (adds child projects to a portfolio project). Importing this link type adds the Link To project (child) to the portfolio of the Link From project (parent). Additional link system names at your company can be found on the Link Type page (<b>Process &gt; Configuration &gt; Link Types</b>).</li> <li data-bbox="630 1745 1351 1814">• <b>From Project Code</b> - The <b>Project Code</b> displayed on the project header to identify the project the link points <i>from</i> (for</li> </ul>

Component	Requirements
	<p>hierarchy links, this is the code of the parent project). No special characters or spaces are allowed.</p> <ul style="list-style-type: none"> <li>• <b>From Process Model Name</b> - The name of the model of the project the link points from.</li> <li>• <b>From Date</b> - Required only for project links that use the <b>Date - Date</b> link type. The <b>From Date</b> can be any milestone on the project. Enter one of the following:               <ul style="list-style-type: none"> <li>• <b>Milestone date metric</b> - METRIC:&lt;<i>metric system name</i>&gt;</li> <li>• <b>Project start date</b> - MD:ProjectStartDate</li> <li>• <b>Project end date</b> - MD:ProjectEndDate</li> <li>• <b>Gate</b> - MD:ProjectNextGateDate, MD:ProjectPreviousGateDate, MD:ProjectFollowingGateDate, MD:ProjectGateDate-&lt;<i>gate number</i>&gt;, or METRIC:&lt;<i>metric system name</i>&gt;</li> </ul> </li> <li>• <b>To Project Code</b> - The <b>Project Code</b> displayed on the project header to identify the project the link points <i>to</i> (for hierarchy links, this is the child project). No special characters or spaces are allowed.</li> <li>• <b>To Process Model Name</b> - The name of the model of the project the link points to.</li> <li>• <b>To Date</b> - Required only for project links that use the <b>Date - Date</b> link type. The <b>To Date</b> can be any milestone within a project. Enter one of the following:               <ul style="list-style-type: none"> <li>• <b>Milestone date metric</b> - METRIC:&lt;<i>metric system name</i>&gt;</li> <li>• <b>Project start date</b> - MD:ProjectStartDate</li> <li>• <b>Project end date</b> - MD:ProjectEndDate</li> <li>• <b>Gate</b> - MD:ProjectNextGateDate, MD:ProjectPreviousGateDate, MD:ProjectFollowingGateDate, MD:ProjectGateDate-&lt;<i>gate number</i>&gt;, or METRIC:&lt;<i>metric system name</i>&gt;</li> </ul> </li> </ul> <p>The projects identified in the <b>From Project Code</b> and <b>To Project Code</b> data columns must <a href="#">use process models that are selected for the link type</a> identified in the <b>Link System Name</b> column. If the process models are not included in the link type definition, the import does not create the links.</p>

Component	Requirements
	<p>The following columns and data are <b>optional</b> for each project link:</p> <ul style="list-style-type: none"> <li>• <b>Delete Link</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> to delete the link. Enter <b>0</b> or leave blank to add or modify the link.</li> <li>• <b>Comments</b> - Enter a description of the link.</li> <li>• <b>Rank</b> - Sets the rank of the Link To project in the portfolio of the Link From project. Used when the <b>Link System Name</b> is <b>HierarchyLinkDefault</b>.</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I	J
1	Link System Name	From Project Code	From Process Model Name	From Date	To Project Code	To Process Model Name	To Date	Delete	Rank	Comments
	LinkTypeA	Project 1	GatedModel1		Project101	GatedModel1		1		These projects are no longer connected
2										
3	LinkTypeB	Project2	GatedModel1		Project102	GatedModel1				
4	LinkTypeC	Project4	GatedModel1	MD:ProjectEndDate	Project114	GatedModel1	METRIC:InitialMarketLaunch			
5	HierarchyLinkDefault	Project3	GatedModelClassic		Project103	GatedModelClassic				
6	HierarchyLinkDefault	Project3	GatedModelClassic		Project113	GatedModelClassic				
7										
8										
9										
10										
11										

Note the following in the example above:

- The import creates a link between the project with code Project2 and Project 102 using the LinkTypeB link type.
- The import creates a parent-child hierarchy link between Project3 (the parent) and Project103 and Project113 (the children) using the **HierarchyLinkDefault** link type.
- The import creates a link with a dependency on Project4 project end date and the Initial market Launch date metric.
- The import removes the link between the projects in row two.

### Map the Project Link Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_PLI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the project links configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:



Component	Requirements
<b>File Name</b>	The project link configuration must be in a file named <b>ACC_PLI_&lt;pair identifier&gt;_Config</b> , where the <pair identifier> matches the project link data file and is unique within Accolade. For example, <b>ACC_PLI_BabyCare_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of project data.
<b>Column Names and Position</b>	<p>The project links configuration must have the following column names, from left to right as listed below:</p> <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>
<b>Accolade Metadata Names</b>	<p>Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database:</p> <ul style="list-style-type: none"> <li>• LinkSystemName</li> <li>• FromProjectCode</li> <li>• FromProcessModelName</li> <li>• ToProjectCode</li> <li>• ToProcessModelName</li> <li>• Date1</li> <li>• Date2</li> <li>• DeleteLink</li> <li>• Comments</li> <li>• Rank</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I
1	Link System Name	From Project Code	From Process Model Name	From Date	To Project Code	To Process Model Name	To Date	Delete	Rank
	LinkTypeA	Project 1	GatedModel1		Project101	GatedModel1			1
2									
3	LinkTypeB	Project2	GatedModel1		Project102	GatedModel1			
4	LinkTypeC	Project4	GatedModel1	MD:ProjectEndDate	Project114	GatedModel1	METRIC:InitialMarketLaunch		
5	HierarchyLinkDefault	Project3	GatedModelClassic		Project103	GatedModelClassic			
6	HierarchyLinkDefault	Project3	GatedModelClassic		Project113	GatedModelClassic			
7									
8									
9									
10									
11									

	A	B
1	Export Column Name	Metadata Name
2	Link System Name	LinkSystemName
3	From Project Code	FromProjectCode
4	From Process Model Name	FromProcessModelName
5	To Project Code	ToProjectCode
6	To Process Model Name	ToProcessModelName
7	Delete	DeleteLink
8	Rank	Rank
9	Comments	Comments
10	From Date	Date1
11	To Date	Date2
12		
13		
14		
15		
16		

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.

### Creating Resource Pool Import Files


Import resource pool data to add new pools and to modify existing pools using two specially named reference tables. The reference table pair begins with **ACC\_RPI\_**, which identifies the tables as reference tables that contain resource pool import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

#### Create a File That Contains the Resource Pool Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RPI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource pools data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	Resource pool data must be in a file named <b>ACC_RPI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the resource pools configuration table and is unique within Accolade. For example, <b>ACC_RPI_GlobalPools_Data</b> .
<b>Rows</b>	Each row contains a different resource pool, and each resource pool exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	<p>The following columns and data are <b>required</b> for each resource pool:</p> <ul style="list-style-type: none"> <li>• <b>Pool Name</b> - Identifies the resource pool in the system. The pool name must be unique.</li> <li>• <b>Pool Unit of Measure</b> - The chosen unit of measure in which requests are made for resources that belong in this pool. For example, FTE for a full time employee.</li> </ul> <p>The following columns and data are <b>optional</b> for each resource pool:</p> <ul style="list-style-type: none"> <li>• <b>Pool Owner Login</b> - The user login of the Resource Planner who manages the pool. If left blank for a pool any Resource Planner is able to manage the pool.</li> </ul> <p> To add additional owners to a pool using the import, run the import once with the additional owner user login listed in the <b>Pool Owner</b> column. Run the import a second time, updating the <b>Pool Owner</b> column to the user login of the primary pool owner. The import moves the original owner of the pool to an additional owner, and imports the new owner as the primary pool owner.</p> <p style="text-align: center;"><b>Note:</b> If the <b>Pool Owner</b> column is not included in the import files, the <b>Pool Owner</b> is set to <b>NONE</b>, and any existing assigned owner is set as an <b>Additional Owner</b>.</p> <ul style="list-style-type: none"> <li>• <b>Pool Requested</b> - Enter <b>Yes, Y, True</b>, or <b>1</b> to set the pool's</li> </ul>

Component	Requirements
	<p>demand type to <b>Requested</b> (all other values indicate <b>False</b>). If a value is present in this column, a value is also required in the <b>Assigned</b> column. A pool can be <b>Requested, Assigned</b>, or both. Defaults to <b>TRUE</b> if the column is not provided on initial pool creation.</p> <ul style="list-style-type: none"> <li>• <b>Pool Assigned</b> - Enter <b>Yes, Y, True</b>, or <b>1</b> to set the pool's demand type to <b>Assigned</b> (all other values indicate <b>False</b>). If a value is present in this column, a value is also required in the <b>Requested</b> column. A pool can be <b>Requested, Assigned</b>, or both. Defaults to <b>TRUE</b> if the column is not provided on initial pool creation.</li> <li>• <b>Pool Parent</b> - For assigned-only pools, enter the pool name of the requested-only pool to which the assigned pool is linked. You can associate assigned-only pools with a parent requested-only pool to establish an associated between the pools, which allows Resource Planners to know which group of resources they can assign to certain requests. Assigned-only pools can be linked to multiple parent pools if the <b>Allow Multiple Links For an Assigned Pool</b> system parameter is enabled. If disabled, an assigned-only pool can be linked to only one requested-only pool. List multiple parents using a pipe (   ) delimited list.</li> </ul> <hr/> <p><b>Important!</b> When linking assigned-only and requested-only pools, the pool named in the <b>Pool Parent</b> column must exist and must be a requested-only pool. Each pool in the link must contain the same <b>Pool Unit of Measure</b>. If you are linking pools, complete the import in two stages: one to import the requested-only pools, and one to import the assigned-only pools. Completing the import in two stages helps to ensure that the pool names listed in the <b>Pool Parent</b> column are established prior to trying to establish a link.</p> <p>To make demand type or unit of measure changes to a pool that is linked to another pool, you must first remove the link before making any changes to either pool.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Pool Security List (1-5)</b> - The security list system name for each list applied to a pool. Security Lists IDs are unique,</li> </ul>

Component	Requirements
	<p>listed in a pipe (   ) delimited list.</p> <ul style="list-style-type: none"> <li>• <b>Pool Extended Fields</b> - One or more columns containing the values in <a href="#">extended fields set to apply to pools</a>.</li> <li>• <b>Active</b> - Enter <b>Yes, Y, True, or 1</b> to activate the pool. Other values or an empty cell sets the status of the pool to <b>Inactive</b>.</li> </ul> <p><b>Note:</b> If the <b>Active</b> column is not included in the import files, the status of the pool is set to <b>Inactive</b> as well.</p> <ul style="list-style-type: none"> <li>• <b>Delete</b> - Enter <b>Yes, Y, True, or 1</b> to delete the resource pool. The importer will delete all pools even if it has resources within it with existing, active demands against it. As a best practice, delete or move the demands to another pool before running the importer.</li> <li>• <b>Pool ID</b> - To rename an existing pool, provide the existing pool's system ID in a Pool ID column, and the new pool name in the <b>Pool Name</b> column. You can find existing pool IDs with the <b>System Resource Pool ID</b> column using reports.</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I	J
1	Pool Name	Unit of Measure	PoolOwner	PoolRequested	PoolAssigned	Pool Parent	Location	Active	Delete	Pool Id
2	Project Managers	FTE	companyDomain\jane_manager	Y	N		USA	TRUE		
3	R&D Engineers	FTE	companyDomain\jane_manager	Y	N		Asia	TRUE		45
4	Manufacturing	FTE	companyDomain\joe_manufacturer	Y	Y	Project Managers	USA	TRUE		
5	Operations	FTE	companyDomain\fred_operations	Y	N		Europe	TRUE		
6										
7										
8										
9										
10										
11										

Note the following in the example above:

- The import renames the existing resource pool in row three to R&D Engineers.
- The import creates a link between the Manufacturing and Project Managers pools.
- The import assigns a value to the Location extended field that is available to pools for each of the pools listed.

**Map the Resource Pools Data to the Accolade Database (Config Table)**

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RPI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource pools configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The resource pools configuration must be in a file named <b>ACC_RPI_&lt;pair identifier&gt;_Config</b> , where the <pair identifier> matches the resource pools data file and is unique within Accolade. For example, <b>ACC_RPI_GlobalPools_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of resource pool data in Accolade.
<b>Column Names and Position</b>	The resource configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>
<b>Accolade Metadata Names</b>	Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database: <ul style="list-style-type: none"> <li>• PoolName</li> <li>• PoolOwner</li> <li>• PoolUnitOfMeasure</li> <li>• PoolRequested</li> <li>• PoolAssigned</li> <li>• PoolParent</li> <li>• SecurityList(1-5) - For example, SecurityList2</li> <li>• ExtendedField(DefaultName) - Name is "Extended Field" plus the default display name of the field. For example, ExtendedFieldMultiSelect6, ExtendedFieldNumber2, ExtendedFieldString3, and so on.</li> <li>• Delete</li> <li>• Active</li> <li>• PoolID</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I	J
1	Pool Name	Unit of Measure	PoolOwner	PoolRequested	PoolAssigned	Pool Parent	Location	Active	Delete	Pool Id
2	Project Managers	FTE	companyDomain\jane_manager	Y	N		USA	TRUE		
3	R&D Engineers	FTE	companyDomain\jane_manager	Y	N		Asia	TRUE		45
4	Manufacturing	FTE	companyDomain\joe_manufacturer	Y	Y	Project Managers	USA	TRUE		
5	Operations	FTE	companyDomain\fred_operations	Y	N		Europe	TRUE		
6										
7										
8										
9										
10										
11										

	A	B
1	Export Column Name	Metadata Name
2	Pool Name	PoolName
3	Unit of Measure	PoolUnitOfMeasure
4	PoolOwner	PoolOwner
5	PoolRequested	PoolRequested
6	PoolAssigned	PoolAssigned
7	Pool Parent	PoolParent
8	Location	ExtendedFieldList1
9	Active	Active
10	Delete	Delete
11	Pool Id	PoolID
12		
13		
14		
15		
16		
17		

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.

**Notes:**

- If an assigned pool that is linked to a requested pool is deleted and auto-calculated capacities are set for the requested pool, the system auto-calculates capacities accordingly.

## Creating Resource Import Files

Import resources data into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_RI\_**, which identifies the tables as reference tables that contain resource import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.


### Create a File That Contains the Resource Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resources data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	Resource data must be in a file named <b>ACC_RI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the resources configuration table and is unique within Accolade. For example, <b>ACC_RI_ResourcesImport_Data</b> .
<b>Rows</b>	Each row contains a different resource, and each resource exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation. For example, <b>AutoCalc</b> might be better column name for you than <b>Calculated Capacity</b> to indicate what data is required in that column.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each resource: <ul style="list-style-type: none"> <li>• <b>Pool Name</b> - The name of the pool to which the resource belongs. This important does not create new resource pools; if the pool name entered does not exist, the row is skipped during import.</li> <li>• <b>Resource Type</b> - Set to either <b>User</b> or <b>General</b> to identify the resource as a user in the system or a general resource,</li> </ul>



Component	Requirements
	<p>such as Any Engineer.</p> <ul style="list-style-type: none"> <li>• <b>Resource System Name</b> - A unique, shorter name that identifies the resource in queries, reporting views, Accolade Office Extensions, and field codes. You can define the system names for both User and General resources.</li> <li>• <b>Resource Name</b> - Required if the resource type is <b>General</b>. For example, Any Engineer or Any Chemist.</li> <li>• <b>Resource User Login</b> - Required if resource type is <b>User</b>. If the user login does not exist, or exists as a resource with existing demands, the row is skipped during import. If the user login exists, and is currently not part of the pool, the user is added as a resource to the specified pool.</li> </ul> <p>The following columns and data are <i>optional</i> for each resource:</p> <ul style="list-style-type: none"> <li>• <b>Delete</b> - Enter <b>Yes, Y, True, or 1</b> to delete the resource from the pool. You cannot delete a resource from a pool if it has existing demands against it. The demands must either be deleted or moved to another resource first.</li> <li>• <b>Calculated Capacity</b> - Typically set for a General resource. If you use requested-only pools and relate them to assigned-only pools, enter <b>Yes, Y, True, or 1</b> for one resource in a pool to indicate that resource as the one that auto-calculates the resource capacity for the pool. As resources are added or removed from a pool that has auto-capacities set, the system recalculates the pool capacity accordingly.</li> </ul> <p> Only one resource in a pool can be set to automatically calculate capacity for the pool. If multiple resources are set for auto-calculation, the import fails.</p>

An existing resource is updated if the **Pool Name** and either the **Resource System Name** or **Resource User Login** match.

 Example

	A	B	C	D	E	F	G
1	<b>Pool Name</b>	<b>Resource Type</b>	<b>Resource System Name</b>	<b>Resource Name</b>	<b>Resource User Login</b>	<b>Delete</b>	<b>AutoCalc</b>
2	Senior Engineers	General	AnySeniorEngineer	Any Senior Engineer			Y
3	Senior Engineers	User	JaneDoe		companyDomain\jane_doe		
4	Senior Engineers	User	JohnDoe		companyDomain\john_doe	TRUE	
5							
6							
7							
8							
9							
10							
11							
12							

Note the following in the example above:

- The import adds resources to the Senior Engineers pool. A single file can include updating and adding resources to more than one pool.
- The import adds Jane Doe (row 3) as a member of the Senior Engineers pool.
- The import removes John Doe (row 4) as a member of the Senior Engineers pool.

### Map the Resources Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resources configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The resource configuration must be in a file named <b>ACC_RI_&lt;pair identifier&gt;_Config</b> , where the <i>&lt;pair identifier&gt;</i> matches the resources data file and is unique within Accolade. For example, <b>ACC_RI_ResourcesImport_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of resource data.
<b>Column Names and Position</b>	The resource configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>

Component	Requirements
<b>Accolade Metadata Names</b>	<p>Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database:</p> <ul style="list-style-type: none"> <li>• ResourceType</li> <li>• ResourceSystemName</li> <li>• ResourceName</li> <li>• ResourceUserLogin</li> <li>• PoolName</li> <li>• Delete</li> <li>• CalculatedCapacity</li> </ul>

**EXAMPLE** Example

	A	B	C	D	E	F	G
1	<b>Pool Name</b>	<b>Resource Type</b>	<b>Resource System Name</b>	<b>Resource Name</b>	<b>Resource User Login</b>	<b>Delete</b>	<b>AutoCalc</b>
2	Senior Engineers	General	AnySeniorEngineer	Any Senior Engineer			Y
3	Senior Engineers	User	JaneDoe		companyDomain\jane_doe		
4	Senior Engineers	User	JohnDoe		companyDomain\john_doe	TRUE	
5							
6							
7							
8							
9							
10							
11							
12							

	A	B
1	<b>Export Column Name</b>	<b>Metadata Name</b>
2	Pool Name	PoolName
3	Resource Type	ResourceType
4	Resource System Name	ResourceSystemName
5	Resource Name	ResourceName
6	Resource User Login	ResourceUserLogin
7	Delete	Delete
8	AutoCalc	CalculatedCapacity
9		
10		
11		
12		
13		
14		

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.

**Creating Resource Demand Curve Import Files**

Import resource demand curves data into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_RDCI\_**, which identifies the tables as reference tables that contain demand curve import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Demand Curve Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RDCI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demand curve data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	Demand curve data must be in a file named <b>ACC_RDCI_&lt;pair identifier&gt;_Data</b> , where <i>&lt;pair identifier&gt;</i> matches the <i>&lt;pair identifier&gt;</i> in the demand curve configuration table and is unique within Accolade. For example, <b>ACC_RDCI_GlobalDemandCurves_Data</b> .
<b>Rows</b>	Each row contains a different demand curve, and each demand curve exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each demand curve: <ul style="list-style-type: none"> <li>• <b>Curve Name</b> - A name that identifies the demand curve. Demand curve names are not required to be unique; however, for import they must be unique for a pool-model combination.</li> <li>• <b>Pool Name</b> - The resource pool to which the demand curve applies. Works in conjunction with the model identified in the Model Name column to identify the projects to which the curve applies.</li> <li>• <b>Model Name</b> - The model to which the demand curve applies. Works in conjunction with the pool identified in the Pool Name column to identify the projects to which the</li> </ul>

Component	Requirements
	<p>curve applies.</p> <p>Only one pool-model name combination can exist in the import per demand curve.</p> <ul style="list-style-type: none"> <li>• <b>Stage</b> - The demand value for each stage in the model. It might be most helpful to name these columns using the stage name within the model. Use the configuration file to map the stages to their appropriate stage number.</li> <li>• <b>Last Stage Duration</b> - If the model ends in a stage, the number of time periods in that stage. This data is not required for models ending in a gate.</li> </ul> <p>The following columns and data are <b>optional</b> for each demand curve:</p> <ul style="list-style-type: none"> <li>• <b>Active</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> to activate the demand curve. Other values or an empty cell sets the status of the curve to <b>Inactive</b>.</li> <li>• <b>Delete Curve</b> - Enter <b>Yes, Y, True,</b> or <b>1</b> in a row to delete the demand curve. Any other values do not delete the curve.</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I
1	<b>Demand Curve Name</b>	<b>Pool Name</b>	<b>Process Model Name</b>	<b>Discovery</b>	<b>Development</b>	<b>Validation</b>	<b>Launch</b>	<b>Active</b>	<b>Delete</b>
2	Low	R&D Senior Engineers	Phase Gate Process	0	0.5	0.25	0.25	Y	
3	Medium	R&D Senior Engineers	Phase Gate Process	0.1	0.25	0.3	0.3	Y	
4	High	R&D Senior Engineers	Phase Gate Process	0.5	0.75	0.5	0.5	Y	
5	Low	Manufacturing	Phase Gate Process	0.25	0.3	0.65	0.65	Y	
6	Medium	Manufacturing	Phase Gate Process	0.55	0.45	0.6	0.6	Y	
7	High	Manufacturing	Phase Gate Process	0.8	0.7	0.8	0.8	Y	
8	Average	Manufacturing	Phase Gate Process	0	0	0	0		Y
9									
10									
11									
12									

Note the following in the example above:

- The file uses the stage names as column headings (Discovery, Development, Validation, etc), to more clearly identify the stages within the model.
- The import adds demand curves to the R&D Senior Engineers pool and the Manufacturing pool for projects based on the Phase Gate Process model.
- The Phase Gate Process model ends in a gate, therefore data to define the duration of

the final stage (Last Stage Duration) is not included in the file.

- The import deletes the Average demand curve for the Manufacturing pool.

### Map the Demand Curve Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RDCI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demand curve configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The demand curve configuration must be in a file named <b>ACC_RDCI_&lt;pair identifier&gt;_Config</b> , where the <i>&lt;pair identifier&gt;</i> matches the demand curve data file and is unique within Accolade. For example, <b>ACC_RDCI_GLocalDemandCurves_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of demand curve data.
<b>Column Names and Position</b>	The demand curve configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>
<b>Accolade Metadata Names</b>	Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database: <ul style="list-style-type: none"> <li>• DemandCurveName</li> <li>• PoolName</li> <li>• ProcessModelName</li> <li>• Stage01, Stage02...Stage20</li> </ul> <p>If the model starts with a gate instead of a stage, the first stage in the model is Stage02, not Stage01, even though it appears as the first stage in the model.</p> <ul style="list-style-type: none"> <li>• LastStageDuration</li> <li>• Active</li> <li>• Delete</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I
1	<b>Demand Curve Name</b>	<b>Pool Name</b>	<b>Process Model Name</b>	<b>Discovery</b>	<b>Development</b>	<b>Validation</b>	<b>Launch</b>	<b>Active</b>	<b>Delete</b>
2	Low	R&D Senior Engineers	Phase Gate Process	0	0.5	0.25	0.25	Y	
3	Medium	R&D Senior Engineers	Phase Gate Process	0.1	0.25	0.3	0.3	Y	
4	High	R&D Senior Engineers	Phase Gate Process	0.5	0.75	0.5	0.5	Y	
5	Low	Manufacturing	Phase Gate Process	0.25	0.3	0.65	0.65	Y	
6	Medium	Manufacturing	Phase Gate Process	0.55	0.45	0.6	0.6	Y	
7	High	Manufacturing	Phase Gate Process	0.8	0.7	0.8	0.8	Y	
8	Average	Manufacturing	Phase Gate Process	0	0	0	0		Y
9									
10									
11									
12									

	A	B	C
1	<b>Export Column Name</b>	<b>Metadata Name</b>	
2	Demand Curve Name	DemandCurveName	
3	Pool Name	PoolName	
4	Process Model Name	ProcessModelName	
5	Discovery	Stage01	
6	Development	Stage02	
7	Validation	Stage03	
8	Launch	Stage04	
9	Active	Active	
10	Delete	Delete	
11			
12			
13			
14			

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.
- Stage names, such as Discovery, are mapped to their stage number in the **Metadata Name** column.

**Notes:**

- Modifying or deleting a curve does not change project demand. The curve must be reapplied to projects through the Resource Editor to update project demand.

### Creating Resource Capacity Import Files

Import resource capacity data into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_RCI\_**, which identifies the tables as reference tables that contain resource capacity import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To

import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Capacity Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RCI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource capacity data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

---

**Important!** Enter all dates in mm/dd/yyyy format, and enter the decimal separator in numbers as a period (.).

---

Component	Requirements
<b>File Name</b>	Resource capacity data must be in a file named <b>ACC_RCI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the resource capacity configuration table and is unique within Accolade. For example, <b>ACC_RCI_GlobalCapacities_Data</b> .
<b>Rows</b>	Each row contains a different capacity, and each capacity exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each resource:  <ul style="list-style-type: none"> <li>• <b>Resource System Name</b> - Required if the resource is a <b>General</b> resource, such as Any Engineer. Use reporting to determine the system name of a <b>General</b> resource.</li> <li>• <b>Resource User Login</b> - Required if the resource type is <b>User</b>.</li> <li>• <b>First Time Period Start Date</b> - The first day of the time period to which the capacity applies. Enter the date in mm/dd/yyyy format.</li> <li>• <b>Last Time Period Start Date</b> - The last day of the time period to which to which the capacity applies. Enter the date in mm/dd/yyyy format.</li> </ul>



Component	Requirements
	<p>If there are data rows that contain capacities that overlap time periods, the last row in the import determines the capacity value for the resource for that time period.</p> <p>The following columns and data are <b>optional</b> for each resource:</p> <ul style="list-style-type: none"> <li>• <b>Resource Capacity Value</b> - The capacity value applied for the resource for all time periods including the first and last. Enter the decimal separate as a period (.), for example, 1.5. You cannot set capacities for resources that set to auto-calculate capacities for a request-only pool. If a capacity value is set to auto-calculate capacity for a request-only pool, the import fails.</li> <li>• <b>Unavailable</b> - Values to subtract from capacity to account for temporary capacity reductions, for example, vacations.</li> </ul> <p>If the capacity value is <b>0</b>, the capacity displays empty in Accolade.</p>

 Example

	A	B	C	D	E	F
1	<b>Resource System Name</b>	<b>Resource User Login</b>	<b>First Period</b>	<b>Last Period</b>	<b>Capacity</b>	<b>Unavailable</b>
2		companyDomain\jane_doe	1/1/2020	12/31/2020	1	
3		companyDomain\jane_doe	7/1/2020	7/31/2020		1
4		companyDomain\john_doe	1/1/2020	12/31/2020	1	
5	AnySeniorEngineer		1/1/2020	12/31/2020	5	
6	AnySeniorEngineer		1/1/2020	12/31/2021	5	
7	AnyQAAlyst		1/1/2020	6/30/2020	2	
8	AnyQAAlyst		7/1/2020	12/31/2020	3	
9						
10						
11						
12						
13						
14						

ResourceCapacityImport\_Data

Note the following in the example above:

- The import enters capacity in terms of full time employees (FTE). For example, Jane Doe is full time employee, therefore her capacity is 1 FTE.

- The import sets Jane Doe's capacity at 1 FTE from January 1, 2020 to December 31, 2020. However, Jane is unavailable in July of 2020, therefore her capacity is reduced from July 1 to July 31 by 1 FTE.
- The import sets the general resource AnySeniorEngineer to a capacity of 5 FTEs for 2020 and 2021.
- The import sets the general resource AnyQAAAnalyst to 2 FTEs for the first half of 2020; however, the company is gaining a QA Analyst for the second half of 2020, so the capacity is set to 3 FTEs.

### Map the Resource Capacity Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RCI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource capacity configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The resource capacity configuration must be in a file named <b>ACC_RCI_&lt;pair identifier&gt;_Config</b> , where the <pair identifier> matches the resource capacity data file and is unique within Accolade. For example, <b>ACC_RCI_GlobalCapacities_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of capacity data.
<b>Column Names and Position</b>	The resource capacity configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>
<b>Accolade Metadata Names</b>	Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database: <ul style="list-style-type: none"> <li>• ResourceSystemName</li> <li>• ResourceUserLogin</li> <li>• FirstTimePeriodStartDate</li> <li>• LastTimePeriodStartDate</li> <li>• Capacity</li> <li>• Unavailable</li> </ul>

**EXAMPLE** Example

	A	B	C	D	E	F
1	Resource System Name	Resource User Login	First Period	Last Period	Capacity	Unavailable
2		companyDomain\jane_doe	1/1/2020	12/31/2020	1	
3		companyDomain\jane_doe	7/1/2020	7/31/2020		1
4		companyDomain\john_doe	1/1/2020	12/31/2020	1	
5	AnySeniorEngineer		1/1/2020	12/31/2020	5	
6	AnySeniorEngineer		1/1/2020	12/31/2021	5	
7	AnyQAAAnalyst		1/1/2020	6/30/2020	2	
8	AnyQAAAnalyst		7/1/2020	12/31/2020	3	
9						
10						
11						
12						
13						
14						

	A	B
1	Export Column Name	Metadata Name
2	Resource System Name	ResourceSystemName
3	Resource User Login	ResourceUserLogin
4	First Period	FirstTimePeriodStartDate
5	Last Period	LastTimePeriodStartDate
6	Capacity	Capacity
7	Unavailable	Unavailable
8		
9		
10		
11		
12		
13		
14		

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.

**Notes:**

- As capacity values change for resources within pools that are set to auto-calculate capacity, the pool's total capacity is recalculated accordingly.

### Creating Resource Demand Import Files

Import resource demand data into Accolade and apply the demands to projects using two specially named reference tables. The reference table pair begins with **ACC\_RDI\_**, which

identifies the tables as reference tables that contain resource demand import data. This import creates demands, but does not import the [demand values](#).

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Demand Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RDI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demands data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

Component	Requirements
<b>File Name</b>	Resource demand data must be in a file named <b>ACC_RDI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the resource demand configuration table and is unique within Accolade. For example, <b>ACC_RDI_NorthAmericaDemands_Data</b> .
<b>Rows</b>	Each row contains a different demand, and each demand exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each resource demand: <ul style="list-style-type: none"> <li data-bbox="631 1392 1317 1528">• <b>Project ID or Identifier String Metric Name</b> - Either the Project ID that displays on the project header, or a string metric that identifies the project to which the demand applies. Only one is required to identify the project. <hr/> <p data-bbox="691 1562 1292 1661"><b>Important!</b> If the <b>Auto-Generate Project IDs</b> system parameter is enabled, use a string metric as the identifier for the project.</p> <hr/> </li> <li data-bbox="631 1709 1341 1812">• <b>Process Model Name</b> - Depending on your system's configuration, this may display on the <b>Project Home</b> page. Used to further identify the projects to which the demand</li> </ul>

Component	Requirements
	<p>applies.</p> <ul style="list-style-type: none"> <li>• <b>Resource System Name</b> - The unique, shorter name that identifies the resource in queries, reporting views, Accolade Office Extensions, and field codes. Required if the demand is for a General resource.</li> <li>• <b>Resource User Login</b> - The domain and Accolade login of the specific user for the demand. Required if resource type is <b>User</b> and not a <b>General</b> resource.</li> <li>• <b>Demand System Name</b> - For the initial import, enter a system name to identify a demand row in Resource Editor. A demand row contains all the demands for a single resource in a specific project.</li> </ul> <p>The following columns and data are <i>optional</i> for each resource demand:</p> <ul style="list-style-type: none"> <li>• <b>Demand Curve Name</b> - The demand curve name, if the demand is part of a demand curve. Only required if the resource is part of a pool that contains a demand curve assigned to the model.</li> <li>• <b>Demand Multiplier</b> - The amount by which the demand curve is multiplied for the demand. Defaults to <b>1</b>.</li> <li>• <b>Demand Curve Effective Date</b> - The first time period that the demands in a demand curve are applied. Defaults to the current time period.</li> <li>• <b>Demand Phase ID</b> - The sequence number of the stage in the model to which the demand applies. If the model starts with a gate instead of a stage, the first stage in the model is Stage02, not Stage01, even though it appears as the first stage in the model.</li> <li>• <b>Demand Type - Requested or Assigned</b>. Defaults to <b>Assigned</b>. If an assigned demand is associated with a request demand, you cannot change the demand type through an import.</li> <li>• <b>Delete</b> - Enter <b>Yes, Y, True, or 1</b> to delete the demand. Any other values do not delete the demand.</li> </ul>

 Example

	B	C	D	E	F	G	H	I	J	K
1	Process Model Name	Demand System Name	Resource System Name	Resource User Login	Demand Type	Demand Curve Name	Curve Multiplier	Effective Date	Stage	Delete
2	Phase Gate Process	AnySeniorEngineer	AnySeniorEngineer		Requested	Low	1	11/1/2020	2	
3	Phase Gate Process			companyDomain\john_smith		Medium	0.9	1/2/2021	3	
4	Phase Gate Process			companyDomain\jane_doe		High	1	6/3/2020	4	
5	Phase Gate Process	AnyQAnalyst	AnyQAnalyst		Requested					
6										
7										
8										
9										
10										
11										
12										

Note the following in the example above:

- Projects in this import are identified using the combination of the project code and process model name, not by an identifier string metric.
- Demands that are part of a demand curve apply to stages in the process model as defined in the Phase ID column.
- Demands are added to Project A for Any Senior Engineer and for John Smith.
- Demands are added to Project B for Any QA Analyst and for Jane Doe.
- No demands are deleted in this import.

### Map the Resource Demand Data to the Accolade Database (Config Table)

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RDI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demands configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The resource demand configuration must be in a file named <b>ACC_RDI_&lt;pair identifier&gt;_Config</b> , where the <i>&lt;pair identifier&gt;</i> matches the resource demand data file and is unique within Accolade. For example, <b>ACC_RDI_NorthAmericaDemands_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of resource demand data.
<b>Column Names and Position</b>	The resource demand configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metric System Name</b> - If a string metric is used to identify the projects in the data file, enter the system name of the</li> </ul>

Component	Requirements
	<p>metric used to identify the projects. If the Project ID is used to identify projects, include this column but leave it blank.</p> <ul style="list-style-type: none"> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> <li>• <b>Unique Identifier</b> - Enter <b>TRUE</b> in the row with the <b>Export Column Name</b> that uniquely identifies the projects within the import. Can be set for either the <b>ProjectCode</b> or a string metric. The import uses what you identify to match the demands to their respective projects.</li> </ul>
<p><b>Accolade Metadata Names</b></p>	<p>Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database:</p> <ul style="list-style-type: none"> <li>• ProjectCode</li> <li>• ProcessModelName</li> <li>• DemandSystemName</li> <li>• ResourceSystemName</li> <li>• ResourceUserLogin</li> <li>• DemandTypeSystemName</li> <li>• DemandCurveName</li> <li>• DemandMultiplier</li> <li>• DemandCurveEffectiveDate</li> <li>• DemandPhaseID</li> <li>• DeleteDemand</li> </ul>

 Example

	A	B	C	D	E	F	G	H	I
1	<b>Project Code</b>	<b>Process Model Name</b>	<b>Demand System Name</b>	<b>Resource System Name</b>	<b>Resource User Login</b>	<b>Demand Type</b>	<b>Demand Curve Name</b>	<b>Curve Multiplier</b>	<b>Effective Date</b>
2	Project A	Phase Gate Process	AnySeniorEngineer	AnySeniorEngineer		Requested	Low	1	11/1/20
3	Project A	Phase Gate Process			companyDomain\john_smith		Medium	0.9	1/2/20
4	Project B	Phase Gate Process			companyDomain\jane_doe		High	1	6/3/20
5	Project B	Phase Gate Process	AnyQAnalyst	AnyQAnalyst		Requested			
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									

	A	B	C	D
1	<b>Export Column Name</b>	<b>Metric System Name</b>	<b>Metadata Name</b>	<b>Unique Identifier</b>
2	Project Code		ProjectCode	TRUE
3	Process Model Name		ProcessModelName	
4	Demand System Name		DemandSystemName	
5	Resource System Name		ResourceSystemName	
6	Resource User Login		ResourceUserLogin	
7	Demand Type		DemandTypeSystemName	
8	Demand Curve Name		DemandCurveName	
9	Curve Multiplier		DemandMultiplier	
10	Effective Date		DemandCurveEffectiveDate	
11	Stage		DemandPhaseID	
12	Delete		DeleteDemand	
13				
14				
15				
16				

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The **Metric System Name** must match the metric system name exactly for the value to update.
- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.
- The **TRUE** setting in the **Unique Identifier** column indicates that project code is used to uniquely identify projects to which the demands apply.



## Creating Resource Demand Value Import Files

Import resource demand values data into Accolade using two specially named reference tables. The reference table pair begins with **ACC\_RDVI\_**, which identifies the tables as reference tables that contain demand value import data.

**Note:** To import this type of data to Accolade, you must have the Process Designer, Project Importer, and Reference Table Manager user roles. To import a new version of an existing file, you must be assigned as the owner of the reference table file used for the import.

### Create a File That Contains the Demand Value Data to Import (Data Table)

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC\_RDVI** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demand values data table as a spreadsheet, CSV, or XML file, ensuring that the contents of the file meets the following requirements:

**Important!** Enter all dates in mm/dd/yyyy format, and enter the decimal separator in numbers as a period (.).

Component	Requirements
<b>File Name</b>	Resource demand value data must be in a file named <b>ACC_RDVI_&lt;pair identifier&gt;_Data</b> , where <pair identifier> matches the <pair identifier> in the demand value configuration table and is unique within Accolade. For example, <b>ACC_RDVI_ResourceDemandValues_Data</b> .
<b>Rows</b>	Each row contains a different demand values, and each demand value exists in only one row.
<b>Column Names and Position</b>	Column headings are in the first row of the worksheet. You can name columns as you see fit for your installation.  The configuration table described below maps the columns in the data table to the respective fields in the Accolade database.
<b>Data</b>	The following columns and data are <b>required</b> for each demand value: <ul style="list-style-type: none"> <li>• <b>Project ID</b> or <b>Identifier String Metric Name</b> - Either the <b>Project ID</b> that displays on the project header, or a string metric that identifies the project to which the demand value applies. Only one is required to identify the project.</li> </ul> <p><b>Important!</b> If the <b>Auto-Generate Project IDs</b></p>

Component	Requirements
	<p>system parameter is enabled, use a string metric as the identifier for the project.</p> <hr/> <ul style="list-style-type: none"> <li>• <b>Process Model Name</b> - Depending on your system's configuration, this may display on the <b>Project Home</b> page. Used to further identify the projects to which the demand value applies.</li> <li>• <b>Resource System Name</b> - The unique, shorter name that identifies the resource in queries, reporting views, and field codes. Required if the demand is for a General resource.</li> <li>• <b>Demand System Name</b> - Required if a <b>Resource System Name</b> is provided. If the field is blank or missing, the import generates a demand system name automatically. To edit existing values for a demand whose system name you do not know, query the database using the Accolade Office Extensions add-in.</li> <li>• <b>First Time Period Start Date</b> - The first time period to which the demand value applies. Enter the date in mm/dd/yyyy format.</li> <li>• <b>Last Time Period Start Date</b> - The last time period to which the demand value applies. Enter the date in mm/dd/yyyy format.</li> </ul> <p>The import loads to Accolade in the order the rows appear in the Data table. If the Data table contains resource demand values for overlapping time periods, the last row in the table for the time period is the row that displays in Accolade after the import.</p> <ul style="list-style-type: none"> <li>• <b>Demand Value</b> - The value to apply to all time periods between and including the dates specified in the <b>First Time Period Start Date</b> and the <b>Last Time Period Start Date</b> columns. The value can be between 0 and 100,000. If the field is blank, no value is added for the demand. If the value is 0, the demand is updated to a value of zero. Enter the decimal separator in numbers as a period (.).</li> </ul> <p>The following columns and data are <b>optional</b> for each demand value:</p> <ul style="list-style-type: none"> <li>• <b>Demand Type - Requested or Assigned.</b> If the field is blank or missing, the demand type is set to <b>Assigned</b>. If an assigned demand is associated with a requested demand, you cannot change the demand type for either request through an import.</li> </ul>



Example

	A	B	C	D	E	F	G	H
1	Project Code	Process Model Name	Demand Type	Demand System Name	Resource System Name	First Time Period	Last Time Period	Demand Value
2	Project A	Phase Gate Process	Assigned	75AAA-B777-4D40-A914-4D118D11AA	AA4DF334-E578-850-70780D6F8ABE	10/1/2020	4/30/2021	5
3	Project B	Phase Gate Process	Assigned	75BBB-B777-4D40-A914-4D118D11AA	BB4DF334-E578-850-70780D6F8ABE	10/5/2020	4/30/2021	4
4	Project C	Phase Gate Process	Assigned	75CCC-B777-4D40-A914-4D118D11AA	CC4DF334-E578-850-70780D6F8ABE	10/15/2020	4/30/2021	2
5								
6								
7								
8								
9								

Note the following in the example above:

- Projects in this import are identified using the combination of the project code and process model name, not by an identifier string metric.
- The import assigns demands to Project A, B, and C, for varying dates.

**Map the Resource Demand Value Data to the Accolade Database (Config Table)**

The configuration table contains the data mapping information so Accolade knows what type of data to expect in the accompanying data file. Administrators and Process Designers add the initial versions of the **ACC\_RDVI** config table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create the resource demand values configuration table as a spreadsheet, CSV, or XML file, ensuring that the file meets the following requirements:

Component	Requirements
<b>File Name</b>	The resource demand value configuration must be in a file named <b>ACC_RDVI_&lt;pair identifier&gt;_Config</b> , where the <i>&lt;pair identifier&gt;</i> matches the demand value data file and is unique within Accolade. For example, <b>ACC_RDVI_ResourceDemandValues_Config</b> .
<b>Rows</b>	Each row maps a column in the data table to a specific type of demand value data.
<b>Column Names and Position</b>	The demand value configuration must have the following column names, from left to right as listed below: <ul style="list-style-type: none"> <li>• <b>Export Column Name</b> - Enter each column heading that is included in the data table.</li> <li>• <b>Metric System Name</b> - If a string metric is used to identify the projects in the data file, enter the system name of the metric used to identify the projects. If the Project ID is used to identify projects, include this column but leave it blank.</li> <li>• <b>Metadata Name</b> - Enter the metadata name below that identifies the data included is in each column in the data table.</li> </ul>

Component	Requirements
	<ul style="list-style-type: none"> <li>• <b>Unique Identifier</b> - Enter <b>TRUE</b> in the row with the <b>Export Column Name</b> that uniquely identifies the projects within the import. Can be set for either the <b>ProjectCode</b> or a string metric. The import uses what you identify to match the demand values to their respective projects.</li> </ul>
<b>Accolade Metadata Names</b>	<p>Use the following metadata names in the <b>Metadata Name</b> column of the configuration table to map the data to the appropriate locations in the Accolade database:</p> <ul style="list-style-type: none"> <li>• ProjectCode</li> <li>• ProcessModelName</li> <li>• ResourceSystemName</li> <li>• DemandTypeSystemName</li> <li>• DemandSystemName</li> <li>• FirstTimePeriodStartDate</li> <li>• LastTimePeriodStartDate</li> <li>• DemandValue</li> </ul>

**EXAMPLE** Example

Each column in the data table is listed in the **Export Column Name** column in the configuration table.

Note the following about the example above:

- Each item in the **Export Column Name** column is a column heading in the data table.
- The **Metric System Name** must match the metric system name exactly for the value to update.

- The names listed in the **Metadata Name** column must match the metadata names listed above exactly for the import to process successfully. Enter the metadata name for each column that matches, or maps, the data in the data file to the Accolade database to ensure the data is imported to the correct location.
- The **TRUE** setting in the **Unique Identifier** column indicates that project code is used to uniquely identify projects to which the demand values apply.

## Validating and Running Data File Imports

Process Designers can validate files before importing the data to Accolade to view potential errors and a summary of project changes that would occur on import.

**Note:** Prior to importing project data to Accolade, ensure that all configuration components referenced in the data tables already exist in the database. The data import process does not create configuration components.

### To validate a data import:

1. [Add both reference tables](#) to Accolade, using the file names as the reference table names.
2. From the **Workspace** menu, select **Import > Data**.  
To narrow the list by importer name or type, add the criteria to filter by in the appropriate filter text box.
3. In the **Actions** column, click **Validate** next to the importer file containing the reference table pair.



Click the import name in the **Name** column to view the data reference table.


Validating an import returns a list of potential errors and outcomes that will occur on import. It does not import data or commit changes back to Accolade. The first five numbered rows detail the data that will be imported if run. These include the number of data types created, updated, and deleted, and the number of invalid rows and total rows if the data is imported. If the reference tables fail, the validate results will not display the project outcomes. Print validation results from the dialog by clicking **Print**.

### To import data to Accolade:

1. [Add both reference tables](#) to Accolade, using the file names as the reference table names.  
Administrators and Process Designers add the initial versions of the reference table pairs. From there, the table owner can update the existing files as needed. The file name prefix identifies the tables as reference tables that contain import data.
2. From the **Workspace** menu, select **Import > Data**.
3. In the **Actions** column, click **Run** next to the importer file containing the reference table pair.



Click the import name in the **Name** column to view the data reference table.

4. *(Optional)* Click  in the **Status/Result** column to access last run results and history including errors, warnings, and abort and cancel information. Correct the errors or

warnings to import the data successfully. Print import results and action history from the dialog by clicking **Print**.

**Note:** After the initial import, updated data and configuration mappings can be uploaded using the method above, replacing the existing files, or using [automatic loading](#). If you have a large amount of data to import, Sopheon recommends using a reference table import via automatic loading to perform the import after hours, as large imports can result in system slowness while the import is running.

## Canceling and Aborting Imports

Once you've selected to run the import, you can cancel or abort at any time during the import process. This will terminate the import and stop project data from being imported into Accolade.

### To cancel or abort an import:

1. From the **Workspace** menu, select **Import > Data**.
2. Click **Abort** to stop and roll back a currently running import, or to remove a pending import.

**Note:** Only one project import can run at a time. Each import runs in the order it was selected to run either manually or by an automatic reference table upload. The Autoloader Service that uploads reference tables automatically adds files to the import queue based on the time selected for them to upload. Additionally, the Autoloader service only adds one set of import files at a time and will not add additional files into the queue until the import has completed. However, you can add import files to the queue manually when the Autoloader service has automatically added a file. Use cancel and abort functions to remove imports from the lineup.

## Troubleshooting Project Data Imports

Ensure the data you are entering in the data table and the config table is accurate. An import can fail as a whole, or only single lines within the data table can fail to import.

If the import fails to run for any lines in the data table, verify that your data and config tables meet the following requirements:

- The config table has one row identified as **TRUE** or **YES** in the **Unique Identifier** column.
- If you are using **Last Gate Number** or **Last Gate Decision Name**, confirm that either they both exist or both do not exist.

- All **Metric System Names** that are specified in the config table exist in the data table, even if they contain no data in their columns.

If the import runs, but you receive errors about some lines not being imported, verify that the data and config tables meet the following requirements:

- The **Unique Identifier** is truly unique. For example, if the config table sets the **Project Code** as the **Unique Identifier**, and the data table contains two projects named Project A, the second Project A does not import.
- All required metrics for a process model are included in each project creation row in the data table. If a required metric is missing, the project fails to import.
- All required metadata fields for a process model, such as **Start Date** or **End Date**, are included in each project creation row in the data table.
- The **Project Code** is included in each row.
- The date in the **GateDateXX** column for a project in the data table is a gate number within the process model. For example, if the process model has 5 gates, and the data table contains data in a **GateDate06** column, the import fails because that process model does not contain a 6th gate.
- Accolade expects project codes to be imported as strings. If the project codes are numbers, or the **Auto-Generate Project IDs** system parameter is enabled (which creates numeric project codes), you must first upload a data table following the format described above that contains a single row of data with a project code entered as a string. After uploading the data table with a single row, upload subsequent versions of the data table that contain the true project data information.
- Project links imported using the **Date - Date** link type are set to the default settings for the link type if the project does not contain the date information entered for the From and To dates.

## Enabling Automatic File Upload

You can configure Accolade to automatically upload reference table versions and related documents when new files are placed in a designated directory.

To enable automatic upload, Administrators must first complete the following:

- [Configure the upload directory.](#)
- [Setup the Autoloader Service User and define the upload directories in Accolade.](#)

After the location and service user are created:

- Process Designers and reference table owners can [enable individual reference tables for automatic uploading.](#)
- Project Importers can setup the [related documents upload and schedule the upload to run.](#)



## Configure the Upload Directory Location

Administrators must create a folder that acts as the drop box location. On the application server, create or identify the following directories:

- The input directory to use as the drop box location. For reference tables, this can be a network directory or an FTP site. For related documents, this can only be a network directory.
- The output directory used to store service error messages and logs.

These can be the same folder.

## Set Up the Autoloader Service User and Autoloader Service

The Accolade Autoloader Service requires a user account to upload new document versions or reference tables to Accolade, and can be used for importing project and resource data. Create the user account for the autoloader service in Accolade and assign it the following roles and access groups:


- Service Account user role. This is automatically assigned when the user is created.
- Project Importer user role, which is automatically assigned when the user is created. This user role is only a requirement when importing project or resource data.
- Appropriate Access Groups with access permission selected. This is only a requirement if loading Reference Tables that contain a specified Access Group.

After setting the user as the autoloader service account (on the server), the user is automatically granted the **Logon as a Service** right.

---

**Important!** If you created the Accolade database login using Windows Authentication, you must add the user login to the database after adding the user to the Autoloader Service. Follow the instructions outlined in the Accolade Installation Guide to create the Accolade database login and add users.

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-  To ensure that reference tables assigned to a specific access group are uploaded successfully when enabled for automatic upload, assign the user with the System Service user role in Accolade access to all access groups defined in the system. See ["Granting Access Group Permissions to Users" on page 91](#).

In addition, Accolade needs to know the directory or FTP location it should look in for new files to upload.

### To setup the Autoloader Service User on the application server:

1. On the application server, from the **Start** menu, select **Administrative Tools > Local Security Policy**.
2. Open the **Local Policies** folder and open the **User Rights Assignment** folder.

3. Right-click the **Log on as a service policy** and select **Properties**.
4. In the **Local Security Setting** tab, add a service user for the upgrade service.
5. Click **OK** to save your changes.

After you have defined the service user on the application server, configure the Accolade Autoloader Service in the Accolade Administration Console. Additionally, after setting up the autoloader service user, add the user login to the database if you created the Accolade login using Windows Authentication.

#### To configure the Autoloader Service:

1. In the Accolade Administration Console, select **Autoloader Configuration** in the Navigation pane.
2. In the **Service Account User** field, add the service account user you created above and enter its password.

This user is added to Accolade as a user with the Service Account user role.

3. Select the **Enabled Service** check box and enter a **Retry Delay on Error** time period in milliseconds to set the retry rate if the service encounters errors.
4. In the **File Locations** section, enter the input (the location with files to upload) and output (the place Accolade saves any log files regarding the upload) locations for the directory or FTP site in the fields appropriate for your setup.

Accolade supports both FTP and FTPs for file uploads. However, if you are using the Autoloader Service for related documents uploads, designate a directory location.

5. Click **Apply** to save your changes.

#### To modify the Autoloader Service in a load balance environment:

**Note:** Reference the *Accolade Installation Guide* for information on setting up load balance environments.

1. Stop any running Autoloader Windows Service instances on all load balanced servers.
2. Make the same change on each load balance server on the Autoloader Configuration page on the Administration Console.
3. Re-enable any previously active Autoloader Windows Service instances on all load balanced servers.

## Importing Related Documents

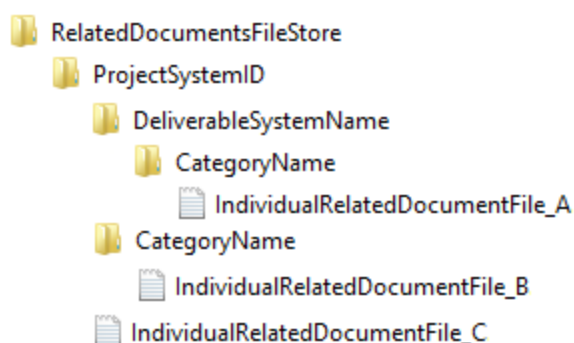
As you implement Accolade, you may have a large number of related document files from your previous innovation management system or process that you want to include with projects and initiatives when you start using Accolade. Use a filestore and the Accolade Autoloader Service to upload the related documents efficiently to Accolade.

**Note:** Users with the Project Importer user role can import related documents. However, an Administrator must enable automatic uploading of files within Accolade. See ["Enabling Automatic File Upload" on page 476](#).

## Related Project Filestore Folder Structure

Accolade uploads related documents using a specific directory structure defined within a drop box location. The drop box location used to store the related documents prior to uploading can be anywhere on your network that Accolade has access to. The Autoloader Service uses the folder structure within the directory to match the related documents to the correct projects in Accolade. Administrators tell Accolade where to find the files in the Autoloader Configuration section of the Accolade Administration Console. See ["Enabling Automatic File Upload" on page 476](#).

Define the folder structure as follows, where **IndividualRelatedDocumentFile** is one or more files to upload as related documents:



Keep the following in mind as you are creating and copying files to the filestore location:

- The filestore cannot be an FTP site.
- The highest folder in the structure must be named **RelatedDocumentsFileStore** so the Autoloader Service recognizes the contents of the directory as a related documents upload.
- The filestore can have multiple **ProjectSystemID** folders representing different projects within Accolade.
- Each **ProjectSystemID** folder can have multiple **DeliverableSystemName** folders representing different deliverables within a project.
- Individual files added to the filestore are uploaded as follows:
  - Files in the **ProjectSystemID** are uploaded as project-level related documents with the **Default** category assignment.
  - Files in the **ProjectSystemID > DeliverableSystemName** are uploaded as deliverable-level related documents and are attached to the deliverable identified in the folder name.

- Files in a category folder, either within the **DeliverableSystemName** folder or in the **ProjectSystemID** folder are uploaded and assigned that category.
- If a file already exists, a new version is created on upload. If multiple files exist with the same name in the same location, the individual files do not upload.

---

**Important!** Ensure files you copy to the filestore directory are not set to Read Only and ensure that the file names, including extensions, do not exceed 64 characters. Files with a name longer than 64 characters do not upload.

---

Files uploaded using the filestore contain the following details after successful upload to Accolade:

- The related document name is the individual file name as it existed in the filestore directory.
- The uploaded by name is the Service Account used for the upload service.
- The author is the Microsoft Windows author of the file.

### Uploading the Related Documents Filestore to Accolade

Consider the following prior to uploading related documents:

- If there is a large number of files to upload, consider running the upload after hours.
- If there is active training or other activity happening within Accolade, consider running the upload after the activity has ended.
- Files larger than the limit set in the **Maximum File upload Size** system parameter do not upload.

#### To upload the related document in the filestore:

1. Ensure files are not set as Read Only and are in the correct directory in the filestore as indicated above, and ensure that the filestore is in the drop box location defined in the Administration Console.
2. From the **Workspace** menu, select **Import > Related Documents**.
3. Do one of the following:
  - **To schedule the upload to run within the next 24 hours** - In the **Scheduled at** fields, enter the time within the next 24 hours to upload the files in the filestore location, and click **Apply**. For example, to upload all files at 10:00 pm, enter **22:00**. The time entered is the time in the application server's time zone, which may be different than the time zone you are in when entering the time in Accolade. After the upload runs, the time is cleared, indicating that an upload is not scheduled.
  - **To run the upload to run immediately** - Select **Now** and click **Apply**.

After a file is processed and uploaded, it is removed from the import directory. A log file is generated and saved in the Outbox Path as defined in the Administration Console

that contains the number of files successfully uploaded and information about any files that encountered an error during the upload process.

## Importing and Exporting Configuration Components Overview

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

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



### Importing and Exporting Configuration Components Best Practices

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

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

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

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

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

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

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

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

Sopheon recommends the following order when importing components:

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

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

Configuration Item	Dependencies*	Notes
		Additionally, if your company uses Resource Planning and the User importer references new resource pools that have not been created, they will cause errors when loading. This can be corrected when running the <a href="#">Resource Pool</a> and <a href="#">Resource</a> importers after the configuration import process is complete.
<b>Reference Tables</b>	None	Note that the Reference Table importer does not import the reference table data, only the table configuration, so the table version must also be manually uploaded at this time.
<b>Queries</b>	None	
<b>Classes</b>	None	If any new classes have the <b>Create Model in Planning</b> defined as <b>Yes</b> , change these fields to <b>No</b> prior to upload in order to prevent errors.  To apply this setting after the initial upload, these fields will need to be changed back to <b>Yes</b> on the workbook, and the workbook will need to be reloaded after the process models are imported.
<b>Dependent Components</b>		
<b>Functional Areas and Functions</b>	User logins**	If this import contains new functions or functional areas to be created, and these are referenced by the user import performed earlier, you will need to re-run the Users import after the Functional Area and Functions import is completed.
<b>Extended Fields</b>	Queries	
<b>HTML Reports</b>	Queries	

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



Configuration Item	Dependencies*	Notes
		<p><b>Important!</b> To minimize errors when creating new metrics, Sopheon recommends users create and load a truncated version of the workbook with all process model associations columns deleted, the <b>Is Calculated</b> field defined as <b>No</b> for all metrics, and the calculated expressions and triggers details removed as necessary.</p> <p>To apply these settings after the initial upload, a version of the workbook including all of these settings will need to be reloaded after the process models are imported. This will capture any metrics associations that were missing on the initial upload.</p>
<b>Accolade Online Reports</b>	Metrics** User IDs**	Note that ownership can only be changed as necessary on the initial import of a new report.
<b>Accolade Charts</b>	Accolade Online Report source User logins** Reference Tables**	
<b>Templates</b>	Metrics	
<b>Quick Grids</b>	Metrics Matrices**	
<b>Workflows</b>	Metrics Templates** Functions** Users**	
<b>Security Profiles</b>	Classes Metrics	
<b>MS Excel Reports</b>	Queries** Templates**	

Configuration Item	Dependencies*	Notes
<b>Layouts</b>	Metrics Online Reports Charts Quick Grids	<p>If layouts contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading the layout configuration.</p> <p>If any new layouts have the <b>Generate Global Link</b> defined as <b>Yes</b>, the upload will automatically generate the global link, however you may need to review and/or edit the link settings manually if they are not included in the Global Links import.</p>
<b>Complex Components</b>		
<b>Process Models</b>	Dependencies can include any combination of independent and dependent components	<p><b>Important!</b> After completing the Process Models import, re-import the following workbooks as necessary:</p> <ul style="list-style-type: none"> <li>• The Metrics workbook should be reloaded with the process model associations and calculations included.</li> <li>• The Matrices workbook should be reloaded with the calculations included.</li> <li>• The Classes workbook should be reloaded with the <b>Create Model in Planning</b> defined as <b>Yes</b> as necessary for classes/process models that are to be available for creating in Innovation Planning.</li> </ul>
<b>Migration Maps</b>	Process Models Metrics	If you have made manual changes to a process model's gate name that is referenced in the file, it can cause errors with the Migration Map import. These migration maps will have to be manually created in the new environment.
<b>Project Link Types</b>	Process Models Metrics	

Configuration Item	Dependencies*	Notes
<b>Global Links</b>	Layouts** Process Models**	<p>If global links contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading global links configuration.</p> <p>If the Layout import included new layouts with the <b>Generate Global Link</b> defined as <b>Yes</b>, the associated global link has been created. The settings for these links can either be updated manually, or can be included in the Global Link import.</p>

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

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

## Importing and Exporting Process Models

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

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

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

### To export model settings:

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

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

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

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

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

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

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

#### To import model settings into Accolade:

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

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

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

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


## Model Settings Included in the Spreadsheet File

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

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

- Process Models

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

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Protect Document Versions from Deletion</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Project ID Metric</b>	Valid metric system name	If blank or invalid, the project ID is not determined by a metric value.
<b>Require Project Manager on Create</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	Separate names using the pipe (   ) character. If blank, the model does not upload.
<b>Extend Project Edit Rights</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Start Date Display Name</b>	Any	If blank, the model does not upload.
<b>Show Creation</b>	Hide Required Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Process Graphic</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Resource Editor</b>	Hide ReadOnly	If blank, the model does not upload.
<b>End Date Display Name</b>	Any	If blank, the model does not upload.
<b>Show Creation</b>	Hide Required Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Process Graphic</b>	Hide ReadOnly Edit	If blank, the model does not upload.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Show Resource Editor</b>	Hide ReadOnly	If blank, the model does not upload.
<b>Currency Show Creation</b>	Hide Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Extended Project Data 1...10 Display Name***</b>	Any	If blank, the model does not upload.
<b>Show Creation***</b>	Hide Edit	If blank, the model does not upload.
<b>Show Migration***</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Planning***</b>	Hide Edit	If blank, the model does not upload.

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

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

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

- Pages

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Visibility Layout Rule System Name</b>	Valid system name of a layout rule established on the Layout Rules worksheet	All other values are set to <b>None</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Link Rules

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

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- Link Rule Metrics

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Link Rule Name</b>	Valid name of a link rule established on the Link Rules worksheet	
<b>Metric System Name</b>	Valid metric system name	If blank or invalid, the condition does not upload.
<b>Metric Value</b>	The value the metric must be set to for the project link to be created	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.
<b>Source Metric System Name</b>	Valid metric system name	If blank or invalid, the condition does not upload.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.

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- Phases

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.

Column Name	Accepted Values on Upload*	Additional Notes
		If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	The number that identifies the placement of the phase within the Phase Gate sequence. For example, a Phase ID of 1 indicates the first stage/gate pair within the model. Phase ID of 2 indicates the stage/gate pair that follows the first stage/gate pair within the model, and so on.  A model can have a single stage or a single gate.
<b>Stage Name</b>	Any	Can be blank if at least one <b>Gate Name</b> is included.
<b>Stage Description</b>	Any	Can be blank.
<b>Gate Name</b>	Any	Can be blank if at least one <b>Stage Name</b> is included.
<b>Gate Description</b>	Any	Can be blank.
<b>Default Gate Manager</b>	Project Manager Project Creator None	All other values are set to <b>None</b> on upload.
<b>Set Gate Date Metric</b>	Valid metric system name	All other values are treated as blank on upload.
<b>Set Gate Date At Project Creation</b>	None Show Required	All other values are set to <b>None</b> on upload.
<b>Require Gatekeeper Voting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Set Gate Decision On Approval</b>	Yes, Y, True, 1, X*	If <b>Set Gate Decision On Approval</b> is defined as Yes, Y, True, 1, X*, the <b>Require Gatekeeper Voting</b> column must also be Yes, Y, True, 1, X*.

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

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

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

- Gate Documents

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Allow Version Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	Separate names using the pipe (   ) character. If blank, the document does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Deliverables and Activities

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
<b>System Name</b>	Alphanumeric characters, underscore**	If blank, the deliverable/activity does not upload.
<b>Name</b>	Any	If blank, the deliverable/activity does not upload.
<b>Description</b>	Any	Can be blank.
<b>Template</b>	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Template System Name</b>	Valid template system name of a template available in the Template Library	<p>The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.</p> <p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>
<b>Quick Grids</b>	Valid quick grid system name	<p>Separate categories using the pipe (   ) character.</p> <p>Can be blank.</p>
<b>Workflow</b>	Valid workflow system name	Can be blank.
<b>Workflow Options</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Link to Phase</b>	Valid phase ID within the model	<p>Used in combination with <b>Link to Phase Name</b> and <b>Link to Assignment System Name</b> to determine the stage and assignment to link to.</p> <p>All other values upload with no link.</p>
<b>Link to Assignment System Name</b>	Valid deliverable or activity system name	Used in combination with <b>Link to Phase Name</b> and <b>Link to Phase ID</b> to determine the stage and assignment to link to.



Column Name	Accepted Values on Upload*	Additional Notes
		All other values upload with no link.
<b>Link to Assignment Type</b>	Deliverable, Activity	All other values upload with no link.
<b>Link to Only Publish</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Function</b>	Valid function system name	All other values are set to <b>None</b> on upload.
<b>Default Start Date Type</b>	Manual Days Percent	All other values are set to <b>Manual</b> on upload.
<b>Default Start Date Value</b>	Number	Leave blank if <b>Default Start Date Type</b> is set to <b>Manual</b> .
<b>Default Deadline Type</b>	Manual Days DaysAfterStart Percent	All other values are set to <b>Manual</b> on upload.
<b>Default Deadline Value</b>	Number	Leave blank if <b>Default Deadline Date Type</b> is set to <b>Manual</b> .
<b>Default Finish Date Type</b>	Manual Days DaysAfterStart Percent	All other values are set to <b>Manual</b> on upload.
<b>Default Finish Date Value</b>	Number	Leave blank if <b>Default Finish Date Type</b> is set to <b>Manual</b> .
<b>Process Assistance URL</b>	Any	Can be blank.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Allow Version Deletion</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Allow Project Manager and Owner to Delete Activities</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Allow Not Required Status</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Allow Default Shared Ownership</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Related Documents</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Disable Complete Status When No Published Version Exists</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Disable Complete Status When Quick Grid Required Values are Missing</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Workflow Template</b>	Any	Can be blank.
<b>Workflow Template System Name</b>	Valid template system name of a Process Document template available in the Template Library	<p>The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.</p> <p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>

Column Name	Accepted Values on Upload*	Additional Notes
<b>Restricted Access User Roles</b>	Valid user role system name	Separate system roles using a semicolon ( ; ) character. Can be blank.
<b>Publish On Upload</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Enforce Function on User Selection</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	Separate names using the pipe (   ) character. If blank, the deliverable/activity does not upload.
<b>Visibility Rule System Name</b>	Valid conditional rule system name	All other values are set to <b>None</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Matrix Metric Filters

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.
<b>Deliverable System Name</b>	Valid deliverable system name	Used for matching for upload.  If a deliverable exists, its settings are changed with the values in the uploaded file.
<b>Activity System Name</b>	Valid activity system name	Used for matching for upload.  If an activity exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
<b>Display in Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Matrix System Name</b>	Valid matrix system name	Used for matching for upload.  If a matrix exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	Must be an existing value in the matrix defined in <b>Matrix System Name</b> , and must be a list metric with a defined list.
<b>Filter</b>	DisplayAndUpdateAllRows DisplayAndUpdateOnlyRowsContaining DisplayAllRowsAndUpdateOnlyRowsContaining	If blank, the filter does not upload.
<b>Filter Value</b>	Valid list value for the metric defined in <b>Metric System Name</b>	Separate values using the pipe (   ) character.  Can be blank.

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

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- Dependencies

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

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- Process Graphic Style

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
<b>Stage Icon</b>	Valid icon name	The icon assigned to the stage within the phase.

Column Name	Accepted Values on Upload*	Additional Notes
		Valid icon names are listed with each icon's picture when you click <b>Icon</b> in the Process Graphic definition page.
<b>Stage Past Color</b>	Valid hex color code	If left blank, defaults to #EFEFEF.
<b>Stage Current Color</b>	Valid hex color code	If left blank, defaults to #C9E1AC.
<b>Stage Future Color</b>	Valid hex color code	If left blank, defaults to #D6D6D6.
<b>Gate Current Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the next gate.  All other values upload with the default diamond shape.
<b>Gate Current Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Future Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to future gates.  All other values upload with the default diamond shape.
<b>Gate Future Color</b>	Valid hex color code	If left blank, defaults to #B0B0B0.

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



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


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

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

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- Auto Gate Decision Rules

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

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

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

- Required Conditions for Go

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

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- Team Page Configuration

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

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

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- Visibility Rules

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

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- Layout Rules

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

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## Importing and Exporting Migration Maps

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

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

### To export migration maps:

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

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

### To import migration maps into Accolade:

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

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

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

### **Migration Map Settings Included in the Spreadsheet File**

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

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**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.

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- Migration Map

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

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

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



## Importing and Exporting Templates

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

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

### To export template settings:

1. From the **System** menu, select **Page Design > Template Library**.
2. Select the templates that you want to download.

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

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

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

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

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

### To import template settings into Accolade:

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

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

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

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

### Template Settings Included in the Spreadsheet File

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

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**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.

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- Template Details

Column Name	Accepted Values on Upload*	Additional Notes
<b>Template System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a template exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new template is created.
<b>Template Name</b>	Any	If blank, the template does not upload.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the template is placed in the <b>Default</b> category.
<b>Description</b>	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Type</b>	Online Form Process Document Spreadsheet Report Presentation Project Plan Image PDF, Email, Other	If blank, the template does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Security

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

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

## Importing and Exporting Quick Grids

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

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

**To export quick grids:**

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

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

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

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

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

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

**To import quick grids into Accolade:**

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

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

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



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

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in

either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

### Quick Grid Settings Included in the Spreadsheet File

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

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**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.

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- Quick Grid

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Publish PDF</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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 ( \_ ).

- Grid Properties

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
<b>Quick Grid Grid Name</b>	Any	If blank, the grid does not upload.
<b>Grid Type</b>	Matrix Standard	If blank, the grid does not upload.
<b>Matrix System Name</b>	Valid matrix system name	If <b>Grid Type</b> is selected as <b>Matrix</b> , enter a valid matrix system name. Otherwise, leave blank.
<b>Number of Columns</b>	Any number	The number of columns in the grid. If blank, the grid does not upload.
<b>Number of</b>	Any number	The number of rows in the grid.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Rows</b>		If blank, the grid does not upload.
<b>Rank</b>	Any number	The order of the individual grids within the quick grid. If blank, the grid does not upload.
<b>Tooltip</b>	Any	Can be blank.
<b>Show Grid Title</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Grid</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Collapsible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Default To</b>	Collapsed Expanded	If blank, defaults to <b>Expanded</b> .
<b>Background Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.
<b>Border Style</b>	None Dotted Dashed Solid Double Groove Ridge Inset Outset	If blank, defaults to <b>None</b> .
<b>Border Width</b>	Valid pixel values	If blank, defaults to <b>1</b> .
<b>Border Color</b>	Valid hex color code	If blank, defaults to color code #ededed.

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

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- Columns

Column Name	Accepted Values on Upload	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.

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

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



- Rows

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

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

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

- Cell Properties

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid Cell System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a cell 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 cell is created.
<b>Quick Grid Column</b>	Any number	The cell's column location within the grid. If blank, the cell does not upload.
<b>Quick Grid Row</b>	Any number	The cell's row location within the grid. If blank, the cell does not upload.
<b>Column Span</b>	Any number	If a merged cell, the number of columns that the cell spans. If blank, defaults to <b>1</b> .
<b>Row Span</b>	Any number	If a merged cell, the number of rows that the cell spans. If blank, defaults to <b>1</b> .
<b>Control Type</b>	Aggregate Button Checkbox CheckboxGroup ComboBox DateInput DropDownBox EmailTextBox FormattedText ListBox MetricLabel MultilineTextBox NumericTextBox PairedListBox RadioButtonGroup RelativeDate RichText TemplatelImage TextBox UserSelector	If <b>Aggregate</b> , <b>Button</b> , <b>FormattedText</b> , or <b>TemplatelImage</b> are selected, the <b>Source Type</b> should be defined as <b>LocalElement</b> . If blank, the cell does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Source Type</b>	LocalElement Metric Metadata Nothing	If <b>Aggregate</b> , <b>Button</b> , <b>FormattedText</b> , or <b>TemplateImage</b> are selected as the <b>Control Type</b> , this must be defined as <b>LocalElement</b> . If blank, the cell does not upload.
<b>Metadata</b>	Valid metadata system name	If <b>Source Type</b> is selected as <b>Metadata</b> , enter the metadata system name. Otherwise, leave blank.
<b>Default Value</b>	Any	Can be blank.
<b>Tooltip</b>	Any	Can be blank.
<b>List Source</b>	Any	Separate each list option by a pipe (   ) character.
<b>Empty Item Text</b>	Any	Can be blank.
<b>Control Width</b>	Valid pixel values	If blank, defaults to <b>None</b> .
<b>Sort</b>	Ascending Descending NoSorting	If blank, defaults to <b>No Sorting</b> .
<b>Enable Markdown</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Link To</b>	None Layout Project Page URL	If blank, defaults to <b>None</b> .
<b>Link To Destination</b>	Valid link address	Can be blank.
<b>Link To Index</b>	Any number, up to 10 digits	Can be blank.
<b>Open in New Tab</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Metric Data Type</b>	Valid metric data type	If <b>Source Type</b> is selected as <b>Metric</b> , enter the metric's data type. Otherwise leave blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Metric System Name</b>	Valid metric system name	If <b>Source Type</b> is selected as <b>Metric</b> , enter the metric's system name. Otherwise leave blank.
<b>Size</b>	Any number	If blank, defaults to <b>0</b> .
<b>Max Length</b>	Any number	If blank, defaults to <b>0</b> .
<b>Prefix</b>	Any	Can be blank.
<b>Suffix</b>	Any	Can be blank.
<b>Allow Negative</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Read Only</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Required</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>User Roles</b>	Valid Accolade user role	Separate each role by a pipe (   ) character.
<b>Text</b>	Any	Can be blank.
<b>Rows</b>	Any number	If blank, defaults to <b>0</b> .
<b>Columns</b>	Any number	If blank, defaults to <b>0</b> .
<b>Project Image Content</b>	Valid image file in Accolade	Can be blank.
<b>Template Image Content</b>	Valid image file in Accolade	Can be blank.
<b>Show Remaining Character Count</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Inline Editing</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Font</b>	Valid font name	If blank, defaults to Noto Sans.
<b>Font Size</b>	Valid pixel values	If blank, defaults to pixel size 13.
<b>Bold</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Italic</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Underline</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Text Color</b>	Valid hex color code	If blank, defaults to color code #404040.
<b>Alignment</b>	Left Center Right  Top Center Bottom	Separate each alignment selection with a pipe (   ) character.  If blank, defaults to <b>Left   Top</b> alignment.
<b>Background Color</b>	Valid hex color code	If blank, defaults to #ffffff.
<b>Border Style</b>	None Dotted Dashed Solid Groove Ridge Inset Outset	If blank, defaults to <b>None</b> .
<b>Border Width</b>	Valid pixel values	If blank, defaults to no border/none.
<b>Border Color</b>	Valid hex color code	If blank, defaults to no border/none.
<b>Tooltip Alignment</b>	Top Middle Bottom	If blank, defaults to <b>Middle</b> alignment.

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

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

- Text Conditions

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

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

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

- **Border Conditions**

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

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

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

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

- Background Conditions

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>RGB</b>	Valid hex color code	If blank, the condition does not upload.
<b>Compare Type</b>	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
<b>Value</b>	Any	If blank, the condition does not upload.

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

- Access Groups

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

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

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

## Importing Matrix Grids

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

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

**Notes:**



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

## Importing and Exporting Workflows

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

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

### To export workflows:

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

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

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

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

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

### To import workflows into Accolade:

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

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

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

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

### Workflow Settings Included in the Spreadsheet File

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

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**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.

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- Details

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new workflow is created.
<b>Workflow Name</b>	Any	If blank, the workflow does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the workflow is placed in the <b>Default</b> category.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Users cannot own multiple actions</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload. The workflow cannot be deleted if in use.

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

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

- **Start Conditions**

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

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

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

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

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- Migration Map Rules

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

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


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- Migration Map Rule Conditions

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

- If the workflows have new migration map condition requirements, enter the new information to upload.

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

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

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- Steps

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new step is created.  💡 The Step and Automated Step system names must be unique within their related workflow.
<b>Step Name</b>	Any	If blank, the step does not upload.
<b>Proceed after 1 decision</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.  💡 The Step and Automated Steps order values must be unique within their related workflow.

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

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- Action

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Action System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow step exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new action is created.
<b>Action Name</b>	Any	If blank, the action does not upload.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
<b>Description</b>	Any	Can be blank.
<b>Function</b>	Valid function system name	If <b>Function</b> is defined, <b>Enforce on User Selection</b> should be set to <b>Yes</b> . Can be blank.
<b>Enforce On User Selection</b>	Yes, Y, True, 1, X*	If <b>Yes</b> is selected, <b>Function</b> must be defined. All other values are treated as <b>No</b> on upload.
<b>Owner</b>	Valid Accolade user	Can be blank.
<b>Permissions</b>	Can Approve Can Edit Can Edit and Publish	If blank, the action does not upload.
<b>Can Skip</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Auth Req</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b># Days</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.

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

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- Action Conditions

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

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

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

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- Automated Step

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



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

Column Name	Accepted Values on Upload	Additional Notes
<b>Template Source</b>	DeliverableTemplate WorkflowTemplate	If <b>Automated Action Type</b> is selected as <b>CreatePDF</b> , a value must be entered. Use <b>DeliverableTemplate</b> as the template source for both deliverables and activities. Otherwise leave blank.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.  💡 The Step and Automated Steps order must be unique within their related workflow.

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- Automated Action Conditions

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

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

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

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

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

- Automated Gate Decision Rules

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

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

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
<b>Automated Gate Decision Rule</b>	Go Kill Hold Recycle Pending Decision	If <b>Automated Action Type</b> on the <b>Automated Step</b> worksheet is selected as <b>SetGateDecision</b> , a value must be entered. Otherwise leave blank.
<b>Metric System Name</b>	Valid metric system name	If blank, the decision rule condition requirement does not upload.
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the decision rule condition requirement does not upload.

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- Access Groups

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

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## Importing and Exporting Layouts

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

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

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

#### To export layout settings and pods:

1. From the **System** menu, select **Page Design > Layouts**.
2. Select the layouts that you want to download.

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

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

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

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


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

#### To import layout settings and pods into Accolade:

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

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

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

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

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

### Layout Settings Included in the Spreadsheet File

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

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**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.

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- Layouts

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	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.
<b>Display Name</b>	Any	If blank, the layout does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	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 <b>Default</b> category.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Project Header Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Process Graphic Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Horizontal Alignment</b>	Left Center Right	If blank, the layout uploads with the default of <b>Left</b> .
<b>Background Color</b>	Valid hex color code	Can be blank and defaults to color code #ffffff.
<b>Margin Color</b>	Valid hex color code	Can be blank and defaults to color code #ffffff.
<b>Page Width</b>	Valid pixel values	Can be blank in which the layout uploads with the default of left aligned.
<b>Icon</b>	Valid alphanumeric icon id	If blank, the layout does not upload. Icon id value displays in icon selection dialog when <a href="#">creating layouts</a> .
<b>Has Master Button</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Layout Filters</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Fill Remaining Height</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add to New Gated Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Add to New Non-Gated Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add to New Idea Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Action Menu</b>	Yes, Y, True, 1, X*	Applies to idea models only. All other values are treated as <b>No</b> on upload.
<b>Generate Global Link</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Groups</b>	Valid access group display name	Separate each access group name using the pipe (   ) character.
<b>Layout Cycles</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Icon Color</b>	Valid hex color codes: #932121, #C76614, #10611E, #36297B, #A21E79, #417491 (blue, default)	All other values including blank are treated as #417491 on upload.
<b>Hide Hierarchy</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Pods

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



Column Name	Accepted Values on Upload*	Additional Notes
<b>Layout System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
<b>System Name</b>	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.
<b>Name</b>	Any	Can be blank.
<b>Type</b>	AdvancedPlatform Buttons Chart Documents Gates GlobalLinks HTMLReport Metric PlanningView Plugin PortfolioOptimization Productivity ProjectImage ProjectInformation QuickGrids Report ReportGroups TemplateImage Voting	If a layout contains the <b>Advanced Platform</b> pod, Accolade downloads the JavaScript files and HTML files in individual file folder along with the spreadsheet file.  Long string metrics with the <b>Rich Text</b> check box enabled are not supported in pods and cannot be imported.  Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Content</b>	Valid pod content name	Do not include spaces between words and the content must be appropriate for the pod <b>Type</b> . Can be blank.
<b>X</b>	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.
<b>Y</b>	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.
<b>Height</b>	Integer value greater than 0	If blank or invalid, the pod does not upload.
<b>Width</b>	Integer value greater than 0	If blank or invalid, the pod does not upload.
<b>Advanced Settings</b>	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: <pre>{"Columns":1,"Items":[ {"Order":null,"IsReadOnly":false,"ObjectTypeID":2,"SystemName":"ProjectName"}, {"Order":null,"IsReadOnly":false,"ObjectTypeID":2,"SystemName":"Description"}, {"Order":null,"IsReadOnly":false,"ObjectTypeID":2,"SystemName":"ProjectId"}]}</pre> If the expression is invalid, the row does not upload.
<b>Plugin Type</b>	Valid configured plugin name	This setting only applies for pods containing plugins.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Filter To Project</b>	Yes, Y, True, 1, X*	This setting only applies to global link and planning view pods. All other values are treated as <b>No</b> on upload.
<b>Title</b>		
<b>Text Alignment</b>	left right center	If blank, the pod uploads with the default of left aligned.
<b>Font Color</b>	Valid hex color code	If blank, defaults to color code #fffff.
<b>Font Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Content</b>		
<b>Font Color</b>	Valid hex color code	If blank, defaults to color code #fffff.
<b>Font Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Background Color</b>	Valid hex color code	If blank, defaults to color code #fffff.
<b>Vertical Bar color</b>	Valid hex color code	If blank, defaults to color code #054353.
<b>Border</b>		
<b>Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Style</b>	none dotted dashed solid groove ridge inset outset	If blank, defaults to solid.
<b>Color</b>	Valid hex color code	If blank, defaults to color code #fffff.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Allow Maximization</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Comparison Set System Name</b>	Valid comparison set system name	Can be blank.

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

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- Comparison Set

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Layout System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
<b>Comparison Set System Name</b>	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.
<b>Comparison Set Name</b>	Any	If blank, the set does not upload.

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

## Importing and Exporting Reference Tables

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

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

### To download reference table settings:

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

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

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

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

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

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

### To import reference table settings into Accolade:

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

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

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

## Reference Table Settings Included in the Spreadsheet File

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

---

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

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- Reference Table

Column Name	Accepted Values on Upload*	Additional Notes
<b>Reference Table System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new reference table is created.
<b>Reference Table Display Name</b>	Any	If blank, the reference table does not upload.
<b>Unique Values in First Column</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the reference table is placed in the <b>Default</b> category.
<b>Owner</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.  If blank, the owner defaults to <b>None</b> .

Column Name	Accepted Values on Upload*	Additional Notes
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.
<b>Available to Metrics</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Reporting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Portfolio Optimizer</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Maximum Number of Versions</b>	Any number	If blank, defaults to unlimited.
<b>Enable Automatic Loading</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Automatic Load Schedule Hours</b>	Valid hour in 24-hour time format	If <b>Enable Automatic Loading</b> is defined as <b>Yes</b> , a value can be entered or this field can be left blank. If blank, defaults to <b>Load immediately</b> . If <b>Enable Automatic Loading</b> is defined as <b>No</b> , leave blank.
<b>Automatic Load Schedule Minutes</b>	Valid minutes in 24-hour time format	If <b>Enable Automatic Loading</b> is defined as <b>Yes</b> , a value can be entered or this field can be left blank. If blank, defaults to <b>Load immediately</b> . If <b>Enable Automatic Loading</b> is defined as <b>No</b> , leave blank.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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 ( \_ ).

- Column Definition

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

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

- Access Groups

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

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

## Importing and Exporting Access Groups

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



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

**To export access groups:**

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

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

**To import access groups into Accolade:**

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

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

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

**Access Groups Settings Included in the Spreadsheet File**

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

---

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

---

- Access Group

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

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

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

## Importing and Exporting Security Profiles

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

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

### To export security profiles:

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

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

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

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

#### To import security profiles into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any security profiles that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > Security Profiles**.
4. Click **Upload** in the top right corner of the page.  
Accolade uploads the changes to the security profiles in the spreadsheet, and adds any new security profiles with unique system names.
5. *(Optional)* Click **Print** to print the import results for your records.

#### Security Profiles Settings Included in the Spreadsheet File

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

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**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.

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- Security Profile Summary

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.
<b>Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- **Classes**

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

- **Metrics**

Column Name	Accepted Values on Upload*	Additional Notes
<b>Security Profile System</b>	Alphanumeric characters, underscore**	Used for matching for upload.

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

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

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

## Importing and Exporting Functional Areas and Functions

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

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

### To export functional areas and functions:

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

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included

in the file, but you can only upload changes to areas to which you have explicit edit permission.

**To import functional areas and functions into Accolade:**

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

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

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

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

**Functional Areas and Functions Settings Included in the Spreadsheet File**

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

---

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

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- Functional Areas

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

- Functions

Column Name	Accepted Values on Upload*	Additional Notes
<b>Functional Area System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a functional area exists, its settings are changed with the values in the uploaded file.
<b>Function System Name</b>	Alphanumeric characters, underscore**	Must be unique. If blank, the function does not upload.
<b>Function Name</b>	Any	If blank, the function does not upload
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Merge To Functional System Name</b>	Alphanumeric characters, underscore**	Used for merging functions. Enter the system name of the function being merged to. See <a href="#">"Merging Functions Together" on page 114</a> .
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

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

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

- Members

Column Name	Accepted Values on Upload	Additional Notes
<b>Function System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a function exists, its settings are changed with the values in the uploaded file.
<b>Members</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.  Include a separate row for each member.

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

## Importing and Exporting Accolade Charts

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

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



**To export chart settings:**

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

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

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

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

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

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

**To import chart settings into Accolade:**

---

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

---

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

6. Click **Upload File**.

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

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

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

may result in warning or error messages during the upload, and may result in an incomplete upload.

### Chart Settings Included in the Spreadsheet File

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

---

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

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- General Settings

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

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Owners</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com. Separate each additional owner with a pipe (   ) character. If blank, the chart does not upload.
<b>Roles</b>	Valid Accolade user role	Separate each role with a pipe (   ) character. Can be blank.
<b>Available to Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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 ( \_ ).

- Bar Chart

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

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

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

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

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

- Pie Chart

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Exploded</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Number Format</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> 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 ( \_ ).

- Bubble Chart

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

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



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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Number Format Vertical Axis</b>	#;(#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(#)</b> on upload.
<b>Number Format Bubble Size</b>	#;(#) #,###;(#,###) \$#,###;(\$#,###)	Indicates how values within the bubble's tooltips are displayed. If blank, the value defaults to <b>#;(#)</b> 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 ( \_ ).

- Grouped Bar Chart

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Target Line Report Source</b>	Valid online report system name	Can be blank.
<b>Target Line Report Key</b>	Valid report column system name	Can be blank.
<b>Target Line Report Value</b>	Valid report column system name	Can be blank.
<b>Vertical Column</b>	Valid report column system name	Can be blank.
<b>Display Grouping Label Vertical</b>	Yes, Y, True, 1, X*	Can be blank.
<b>Number Format Horizontal Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Number Format Vertical Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

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

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- **Stacked Bar Chart**

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Horizontal Column</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Axis Label Horizontal</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Bar Segments</b>	Valid report column system name	Separate each bar with a pipe (   ) character. If Vertical Column has a value, then only one bar segment allowed. If blank, the chart does not upload.
<b>Stacked to 100%</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Display Totals</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Bar Axis Units</b>	Any	Can be blank.
<b>Display Type</b>	Vertical Horizontal	If blank, the value defaults to <b>Vertical</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Number Format Bars</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

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

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

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- Radar Chart

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

Column Name	Accepted Values on Upload	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Polygons</b>	Valid report column system name	If blank, the chart does not upload.

Column Name	Accepted Values on Upload	Additional Notes
<b>Spokes</b>	Valid report column system name	Separate each spoke with a pipe (   ) character. If blank, the chart does not upload.
<b>Spoke Axis Scale</b>	Automatic Custom	If blank, defaults to <b>Automatic</b> .
<b>Spoke Axis Range Min</b>	Any number	If <b>Spoke Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range minimum value. Otherwise leave blank.
<b>Spoke Axis Range Max</b>	Any number	If <b>Spoke Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range maximum value. Otherwise leave blank.
<b>Number Format</b>	#, (#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#, (#)</b> on upload.
<b>Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Opacity</b>	0.1 0.2 0.3 0.4 0.5 0.6 07 0.8 0.9 1	If <b>Lines Only</b> is selected as the style, set the opacity to <b>1</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

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- Line Chart by Columns Chart

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Lines</b>	Valid report column system name	If blank, the chart does not upload.
<b>Horizontal Axis Title</b>	Alphanumeric characters	Can be blank.
<b>Show Horizontal Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Columns</b>	Valid report column system name	Separate column names using a pipe (   ) character. If blank, the chart does not upload.
<b>Vertical Axis Title</b>	Alphanumeric characters	Can be blank.
<b>Show Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Display Point Marker</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.



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

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

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- Line Chart Trends Chart

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Display Point Marker</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Line Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

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

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- Access Groups

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

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

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- Cycles

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

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

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## Importing and Exporting HTML Reports

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

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

### To export report settings:

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

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

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

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

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

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

### To import report settings into Accolade:

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

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

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

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

### HTML Report Settings Included in the Spreadsheet File

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

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**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.

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- HTML Report

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>HTML Report System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a report exists, its settings are changed with the values in the uploaded file. If it is new, a unique system name exists in the file when uploaded, a new report is created.
<b>HTML Report Display Name</b>	Any	If blank, the report does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the report is placed in the <b>Default</b> category.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Query</b>	Valid query system name	If blank, the report does not upload.
<b>Transpose</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active in Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active in Projects</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Required Notifications

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

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

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- Roles

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

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

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- Access Groups

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

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

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

## Importing and Exporting MS Excel Reports

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

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



**To export report settings:**

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

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

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

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

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

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

**To import report settings into Accolade:**

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

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

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

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

## MS Excel Report Settings Included in the Spreadsheet File

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

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**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.

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- Excel Report

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

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Template</b>	Valid template system name of a template available in the Template Library	Template must be uploaded prior to being added to the report. If blank, the report does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

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

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

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

- Access Groups

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

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

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

## Importing and Exporting Accolade Online Reports

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

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

### To export report settings:

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

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

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

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

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

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

### To import report settings into Accolade:

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

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

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

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

### Online Report Settings Included in the Spreadsheet File

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

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**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.

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- Report Settings

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a report exists, its settings are changed with the values in the uploaded file. If it is new, a unique system name exists in the file when uploaded, a new report is created.
<b>Display Name</b>	Any	If blank, the report does not upload.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the report is placed in the <b>Default</b> category.
<b>Subject System Name</b>	Valid report subject system name	Used for matching for upload.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>If the <b>Subject System Name</b> specifies <b>Project Snapshot History</b>, a value must be entered in the <b>Is Snapshot</b> field on the Columns and Filters worksheet.</p> <p>If blank, the report does not upload.</p>
<b>Owner</b>	Valid user system ID	<p>Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.</p> <p>If you are uploading a new report, the downloaded file can be changed to a new owner in order to transfer initial ownership when loading the file. If this field is left blank or has an invalid user ID entered, the system will assign the user completing the upload as the owner of the report.</p> <p>If you are making changes to an existing report via upload, the <b>Owner</b> column is ignored and will not update.</p> <p> If a downloaded report was created by a user that has been deleted, this file will reflect <b>[None]</b> as the report owner.</p>
<b>Additional Owners</b>	Valid user system ID	<p>Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.</p> <p>Separate each additional owner by a pipe (   ) character.</p> <p>Can be blank.</p>
<b>Roles</b>	Valid Accolade user role	<p>Separate each role by a pipe (   ) character.</p> <p>Can be blank.</p>
<b>Description</b>	Any	Can be blank.
<b>Override Project Filtering</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Export Days</b>	Integers	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Export Time</b>	Time value in	Can be blank.
<b>Export File Path</b>	Valid file path for the export to	Can be blank.
<b>Export File Name</b>	Alphanumeric characters, underscore**	Can be blank.
<b>Export Include Timestamp</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Export File Type</b>	Excel CSV	If blank, the setting defaults to <b>Excel</b> .
<b>Available to Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Transpose</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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 ( \_ ).

- Columns and Filters

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
<b>Unique Group System Name</b>	Valid reference table system name Valid matrix system name	Can be blank if <b>Reporting Column Type</b> is defined as <b>Standard</b> or <b>Metric</b> .

Column Name	Accepted Values on Upload*	Additional Notes
<b>Reporting Column Type</b>	Standard Reference Table Metric Matrix Calculated	The value is related to the <b>Reporting Data Type</b> value, and must match in terms of appropriate data types. If blank, the report does not upload.
<b>Reporting Data Type</b>	String Image List Number Date Boolean ID Multilist	The value is related to the <b>Reporting Column Type</b> value, and must match the column type. If blank, the report does not upload.
<b>Column System Name</b>	Valid report column-specific system name**	Used for matching for upload. If a report column exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new column is created.
<b>Display Name</b>	Any	Can be blank.
<b>Sort Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Sort Ascending</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Property</b>	Aggregation Method None Avg Min Max StDev Sum Date Mask Excel Dates Days Months Quarters Years Link	Link is only available for the Project Name report column. Can be blank.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Column Order</b>	Any number	Must be a unique value for each column included in a report.
<b>Display Column On Report</b>	Yes, Y, True, 1, X*	Set the value to <b>No, N, False, 0</b> if the column is only used as a filter and not a report column. Otherwise, set the value to <b>Yes, Y, True, 1, X</b> and specify the <b>Filter ID</b> if applicable.  All other values are treated as <b>No</b> on upload.
<b>Filter ID</b>	Any number	Must be a unique value for each filter included in a report.  Can be blank if the report does not include filters and the <b>Display Column On Report</b> is set to <b>Yes</b> .
<b>Filter Type</b>	equal not equal greater than less than greater than or equal to less than or equal to is empty is not empty between contains does not contain is one of between days between dates days before days after	If a <b>Filter ID</b> is specified, the <b>Filter Type</b> must be defined. and values must be entered on the Filter Values worksheet.  Can be blank if the report does not include filters and the <b>Display Column On Report</b> is set to <b>Yes</b> .
<b>Is Snapshot</b>	Yes, Y, True, 1, X*	If the <b>Subject System Name</b> on the Report Settings worksheet is set to <b>Project Snapshot History</b> , this field determines if the metric or matrix is part of the snapshot, and must have a value entered. Otherwise, can be blank.  All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Is Link</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Formula</b>	A valid expression	If <b>Reporting Column Type</b> is defined as <b>Calculated</b> , the <b>Formula</b> must be defined for the calculated column. Otherwise, can be blank.
<b>Data Format</b>	<p><i>For columns containing dates:</i></p> <p>Days Months Quarters Years Excel Dates Timestamp</p> <p><i>For columns containing numbers:</i></p> <p>#, (#) #,###,(#,###) \$#,###,(\$#,###)</p>	<p><b>Data Format</b> only applies for columns that contain date or number values and specifies how the data displays when the report is run.</p> <ul style="list-style-type: none"> <li>• <b>Date columns</b> - If blank, the value defaults to <b>Excel Dates</b> on upload.</li> <li>• <b>Number columns</b> - If blank, the value defaults to <b>#, (#)</b> on upload.</li> </ul>
<b>Show</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Filter Values

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Filter ID</b>	Any number	Used for matching for upload. If a filter exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new filter is created.

Column Name	Accepted Values on Upload	Additional Notes
		Can be blank if the report does not include filters.
<b>Filter Value Rank</b>	Any number	Can be blank if only one filter is included in the report.
<b>Filter Value Type</b>	Text Field code Metadata Metric Current User	If the report includes filters and this field is blank, the filter does not upload.
<b>Filter Value</b>	Valid metric system name or field code	If the <b>Filter Type</b> on the Columns and Filters worksheet is defined as <b>is one of</b> , separate the metric or field code system name values with a pipe (   ) character.  If the <b>Filter Type</b> on the Columns and Filters worksheet is defined as <b>between</b> , the worksheet includes additional rows for each filter value. Additionally, concatenate an integer to the field code system name to further specify the field code. For example, a gate date field code would include an integer to specify if it is referencing gate date 1, 2, 3, etc.  Can be blank.
<b>Filter Runtime Filter</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

- Access Groups

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

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

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- Matrix Join Definitions

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

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

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

## Importing and Exporting Queries

Accolade provides Administrators and Process Designers the ability to export queries from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may

have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate queries in each environment, download the information and import it into the new environment.

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

#### To export queries:

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

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

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

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

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

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

#### To import queries into Accolade:

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

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

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

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

may result in warning or error messages during the upload, and may result in an incomplete upload.

### Queries Settings Included in the Spreadsheet File

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

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**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.

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- Queries

Column Name	Accepted Values on Upload	Additional Notes
<b>Query System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a query exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new query is created.
<b>Query Name</b>	Any	If blank, the query does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If blank, the query is placed in the <b>Default</b> category.
<b>SQL</b>	Valid query	Enter the query code.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

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

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

## Importing and Exporting Metrics

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

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

### To export metric settings:

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

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

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

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

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

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

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

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

**To import metric settings into Accolade:**

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

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

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

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

**Metric Settings Included in the Spreadsheet File**

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

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**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.


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- Metrics

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

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



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

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

Column Name	Accepted Values on Upload*	Additional Notes
		<p>Only one interval of the same type may be assigned. If more than one interval is uploaded the first displayed will be set. For example, two-day events cannot be assigned, but day and month can be assigned.</p> <p>To apply more than one trigger, separate timed events using a pipe (   ) character.</p> <p>Timed event accepted values use international dates, and 24 hour times. EndOfMonth dynamically changes based on the date each month falls on.</p> <p>If the metric value is invalid, the trigger will not be assigned.</p>
<b>Initialized From</b>	Valid metric system name	The row does not upload if the indicated system name is not a valid system name for an existing metric.
<b>Metric Query</b>	Valid SQL query expression	<p>Applies only to List and Multi-Select List metrics that use a query to determine the list values.</p> <p>The row does not upload if the expression is invalid.</p>
<b>Office Format</b>	#, 0	Applies only to Number type metrics in Microsoft Word or PowerPoint.
<b>Track History</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Reference Table</b>	Valid reference table system name	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
<b>Reference Table Column</b>	Valid column system name within the table	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
<b>Reference Table Constraints</b>	Valid reference table column value or valid query code	<p>Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.</p> <p>Separate list items using a pipe (   ) character.</p>

Column Name	Accepted Values on Upload*	Additional Notes
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Milestone Shape Color Metric System Name</b>	Valid metric system name	Applies only to Date type metrics that have <b>Available to Planning</b> selected as <b>Yes</b> .  The row does not upload if the indicated system name is not a valid system name for an existing metric.  If blank, defaults to <b>[None]</b> .
<b>Restrict to These Roles</b>	Valid Accolade user role	Separate roles using a pipe (   ) character.
<b>Allow Updates from All My Work page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Workflow Lineup</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Groups</b>	Valid access group display name	Separate access groups using a pipe (   ) character.
<b>Available to BI</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Search</b>	Yes, Y, True, 1, X*	Applies only to String, Long String, and Multi-Select List metrics.  All other values are treated as <b>No</b> on upload.
<b>Rich Text</b>	Yes, Y, True, 1, X*	Applies only to Long String metrics.  All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> 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 ( \_ ).

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

- Additional Model Settings

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

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Associated</b>	Yes, Y, True, 1, X*	This column defaults to <b>Yes</b> if any of the related model columns are defined. All other values are treated as <b>No</b> on upload.
<b>Project Creation</b>	Edit Show	Can be blank.
<b>Project Metrics</b>	Edit Show	Can be blank.
<b>Status Report</b>	Edit Show	Can be blank.
<b>Portfolio</b>	Edit Show	Can be blank.
<b>Planning Favorite</b>	Yes, Y, True, 1, X*	The <b>Available to Planning</b> column for the metric must be set to <b>Yes, Y, True, 1, X*</b> if this column is set to <b>Yes, Y, True, 1, X*</b> . All other values are treated as <b>No</b> on upload.
<b>Milestone</b>	Yes, Y, True, 1, X*	Applies only to Date type metrics. The <b>Available to Planning</b> column on the metric must be set to <b>Yes, Y, True, 1, X*</b> if this column is set to <b>Yes, Y, True, 1, X*</b> . All other values are treated as <b>No</b> on upload.
<b>Required</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

- List Values

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

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

Column Name	Accepted Values on Upload	Additional Notes
<b>Metric System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a metric exists, its settings are changed with the values in the uploaded file.
<b>List Value Name</b>	Any	If blank, the list value does not upload.
<b>List Value System Name</b>	Alphanumeric characters, underscore**	Can be blank.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Color</b>	Valid hex color code	Can be blank.

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

## Importing and Exporting Matrices

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

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

### To export matrices:

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

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

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

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

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

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

#### To import matrices into Accolade:

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

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

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

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

#### Matrix Settings Included in the Spreadsheet File

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

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**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.

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- Details

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

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

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

- Metrics



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

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

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

- Models

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

Column Name	Accepted Values on Upload*	Additional Notes
<b>Model</b>	Valid process model system name	If blank, matrix does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

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

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

## Importing and Exporting Extended Fields

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

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

### To export extended fields:

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

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

**To import extended fields into Accolade:**

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

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

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

**Extended Fields Settings Included in the Spreadsheet File**

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

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**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.

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- Extended Fields

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

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

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

## Importing and Exporting Project Link Types

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

Instead of having to recreate link types in each environment, download the information and import it into the new environment.

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

**To export project link types:**

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

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

**To import project link types into Accolade:**

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

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

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

**Project Link Types Settings Included in the Spreadsheet File**

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

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**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.

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- Link Types

Column Name	Accepted Values on Upload*	Additional Notes
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new link type is created.
<b>Link Type Display Name</b>	Any	If blank, the link type does not upload.
<b>Link From Name</b>	Any	If blank, the link type does not upload.
<b>Link To Name</b>	Any	If blank, the link type does not upload.
<b>Description</b>	Any	Can be blank.
<b>Line Color</b>	Any color.	If blank, defaults to <b>Black</b> .
<b>Arrow Direction</b>	Neither Direction To --> From From --> To Both Directions <-->	If blank, defaults to <b>Neither Direction</b> .
<b>Dependency Type</b>	Start - Start Finish - Finish Finish - Start Date - Date None	If blank, defaults to <b>None</b> . If <b>Date - Date</b> is selected, <b>Source Default Date</b> and <b>Target Default Date</b> need to be defined.
<b>Source Default Date</b>	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless <b>Dependency Type</b> is defined as <b>Date - Date</b> .
<b>Target Default Date</b>	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless <b>Dependency Type</b> is defined as <b>Date - Date</b> .
<b>Manage Links</b>	To --> From From --> To Both Directions <-->	If blank, defaults to <b>Both Directions &lt;--&gt;</b> .

Column Name	Accepted Values on Upload*	Additional Notes
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

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

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

- Mappings

Column Name	Accepted Values on Upload*	Additional Notes
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file.
<b>From Process Model</b>	Valid process model system name	If blank, the link type does not upload.
<b>To Process Model</b>	Valid process model system name	If blank, the link type does not upload.
<b>Max Project Links</b>	Any number	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
Delete	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

## Importing and Exporting Global Links

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

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

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

### To export global links:

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

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

### To import global links into Accolade:

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

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

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



## Global Links Settings Included in the Spreadsheet File

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


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**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.

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- Global Links

Column Name	Accepted Values on Upload*	Additional Notes
<b>Global Link System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a global link exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new global link is created.
<b>Global Link Name</b>	Any	If blank, the global link does not upload.
<b>Link Prefix</b>	Valid link prefix	Enter the prefix for the global link being created. Accolade supports the following link types: <ul style="list-style-type: none"> <li>• <b>http</b> - A URL to a Web page.</li> <li>• <b>https</b> - A URL to a secure Web page.</li> <li>• <b>ftp</b> - A link to an FTP download site.</li> <li>• <b>file</b> - A link to a file or executable on your company's intranet.</li> <li>• <b>qvp</b> - A link to a Dashboards for Accolade chart if using the Dashboards viewer.</li> <li>• <b>mailto</b> - Opens the user's email application and displays a blank email addressed to this email address.</li> <li>• <b>callto</b> - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat.</li> </ul>

Column Name	Accepted Values on Upload*	Additional Notes
		 Based on your server setup, http, https, and file global link types are available to <a href="#">add as the content of a pod within a page layout</a> .
<b>Link</b>	Valid link address	Enter the address for the global link being created. For example, www.google.com. If blank, the global link does not upload.
<b>Menu</b>	Alphanumeric characters	Used for matching for upload. If a display menu exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display menu is created. To create a global link that is only available to add to a pod within a layout, leave this option blank.
<b>Embed</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Landing Page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Default Home Page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Display in menu</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Category</b>	Alphanumeric characters	Used for matching for upload. If a display category exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display category is created. To create a global link that is only available to add to a pod within a layout, leave this option blank.  Category is required on the global link to Display in menu.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

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


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

## Importing and Exporting Parameters

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

### To export parameters settings:

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

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

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

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

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

**To import parameters settings into Accolade:**

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

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

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

**Parameter Settings Included in the Spreadsheet File**

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

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**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.

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- Parameters

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

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## Chapter 8

# Backing Up the Databases

Sopheon does not recommend any specific frequency of backing up your data. You should back up your data as frequently as is indicated by your company's policies and needs.

Back up the following Accolade databases.

- Main Accolade Database - Accolade uses a SQL Server database to organize and persist the major structural elements of the system. By default, this database is named Accolade, but it can be given a different name during installation.

The Accolade database contains the templates and documents that were stored in directories on the application server in previous versions of Accolade.

- Snapshots Database - The snapshots database contains snapshots of metrics values and project metadata and is named *<main database name>\_Snapshots*. For example, Accolade\_Snapshots.

Back up any custom data, such as custom views, custom DLLs, ASP pages, or icon sets, at least once and each time they are modified. You should also back up your custom data just before upgrading Accolade.

Icon sets are installed by default in the following directory:

```
C:\Program Files\Sopheon\Accolade\Etc\IconSets
```



---

## Appendix A

# Accolade Reporting Views

This appendix lists the standard Accolade reporting views and the contents of each. A reporting view is a collection of Accolade database fields that relate to a specific Accolade concept, such as users, projects, or resource pools, or that show the relationship between two objects, such as templates and deliverables.


Use this appendix as a reference to determine which fields are available in each [standard view](#). In addition, use the information in this appendix to create [custom reporting views](#).

## Reporting Views Overview

A reporting view is a collection of database fields that relate to a specific Accolade concept, such as users, projects, or resource pools, or that show the relationship between two objects, such as templates and deliverables. Insert the database field references in queries to create Accolade reports.

Accolade contains the following reporting view types:

- **Project Reporting Views** - Reporting views that contain database fields with project information begin with **RVP\_**. Reports created with these views use respect the security set with access groups and security profiles. Users view a chart or report, or previewing a query, see only data that relates to projects in access groups to which they have access.
- **Non-Project Reporting Views** - Reporting views that contain only database fields that do not relate directly to project begin with **RV\_**. The content in these reporting views is not affected by access group or security profile access.
- **Custom Views** - Custom reporting views begin with **CRVP\_** and **CRV\_**.

 To quickly view the list of all reporting views in Accolade, from the **System > Content Sources > Queries** menu, create and preview the following query: `SELECT * from RV_ReportingViews`. Substitute the `RV_ReportingViews` portion of the query with any reporting view name to see the list of all columns within that view.

## Standard Accolade Reporting Views

The following table lists and links to the reporting views that are included in the standard version of Accolade.

Some views, such as `RVP_Projects` contain information to answer a variety of questions about a single object, such as a project. Other views, such as `RV_ExcelReportQueries` are intended to show the relationships between two object types. You can use them to determine, for example, which MS Excel workbooks use a particular query or which queries are used by a particular MS Excel workbook.

Reporting View	See	Description
<code>RV_ActivityTemplateUse</code>	<a href="#">page 631</a>	Cross-references activity templates and their models.
<code>RV_Classes</code>	<a href="#">page 631</a>	Contains class details.
<code>RV_ClassResonLists</code>	<a href="#">page 632</a>	Cross-references classes and their lists of events and reasons.



Reporting View	See	Description
RV_DeliverableTemplateUse	<a href="#">page 632</a>	Cross-references templates and their use in deliverables.
RV_ExcelReportQueries	<a href="#">page 632</a>	Cross-references MS Excel workbooks and their associated queries.
RV_ExcelTemplateUse	<a href="#">page 633</a>	Cross-references MS Excel workbooks and their associated templates.
RV_GateDocumentTemplateUse	<a href="#">page 633</a>	Contains information about the templates used in gate documents.
RV_ModelMetrics	<a href="#">page 634</a>	Cross-references metrics with the models that are associated to.
RV_PMDelivActivities	<a href="#">page 634</a>	Contains model details about activities, including deliverable details.
RV_PMDeliverables	<a href="#">page 635</a>	Contains model details about deliverables.
RV_PMGateDocuments	<a href="#">page 635</a>	Contains gate document details for models.
RV_PMPhases	<a href="#">page 636</a>	Contains stage and gate details for models.
RV_ProcessModels	<a href="#">page 636</a>	Contains process model details.
RV_Queries	<a href="#">page 637</a>	Contains the name and contents of each SQL Query.
RV_QueryUsage	<a href="#">page 637</a>	Cross-references queries with charts, reports, and MS Excel workbooks.
RV_ReferenceTables	<a href="#">page 638</a>	Contains reference table details.
RV_ReportingViews	<a href="#">page 638</a>	Lists the reporting views available within Accolade.
RV_ReportQueries	<a href="#">page 638</a>	Cross-references reports and queries.
RV_ResourceAvailabilities	<a href="#">page 639</a>	Contains availability details for all Resource Pools.
RV_ResourcePools	<a href="#">page 639</a>	Contains a list off resource pools with their details and owners.
RV_ResourcePoolOwners	<a href="#">page 639</a>	Contains a list of the resource pool owners and the pools they own.
RV_Resources	<a href="#">page 640</a>	Contains resource details.
RV_UserAccessLastLogin	<a href="#">page 640</a>	Contains a record of each user's last successful log on to Accolade.
RV_UserAccessLog	<a href="#">page 640</a>	Contains data about user log ons to Accolade.
RV_Users	<a href="#">page 642</a>	Contains details about Accolade users.
RV_UsersByGroup	<a href="#">page 642</a>	Cross-references users and their access groups.
RV_UsersByProfile	<a href="#">page 642</a>	Cross-references users and their security profiles.

Reporting View	See	Description
RVP_DelegateAssignments	<a href="#">page 643</a>	Shows all assignments delegated to users and who originally owned them.
RVP_MostRecentStatus	<a href="#">page 643</a>	Shows the project's manager (team leader) and most recent status message of each project with at least one status message.
RVP_MSProjectTasks	<a href="#">page 644</a>	Contains tasks created in MS Project.
RVP_ProcessModelUse	<a href="#">page 644</a>	Cross-references projects and models.
RVP_ProjectDelivActivities	<a href="#">page 645</a>	Cross-references projects with the details of their deliverables and activities.
RVP_ProjectDeliverables	<a href="#">page 646</a>	Cross-reference projects with their deliverables' details.
RVP_ProjectGateDocuments	<a href="#">page 647</a>	Cross-references gate documents and their projects.
RVP_ProjectHistory	<a href="#">page 648</a>	Contains project events, reasons, and status messages.
RVP_ProjectMetrics	<a href="#">page 649</a>	Cross-references metric values and project details.
RVP_ProjectMigrationHistory	<a href="#">page 649</a>	Identifies which projects were migrated and the projects they were migrated to.
RVP_ProjectPhases	<a href="#">page 650</a>	Contains the stage and gate details for projects. Gates with more than one gatekeeper are repeated with only the gatekeeper details changing.
RVP_ProjectResourcePlans	<a href="#">page 651</a>	Contains details about the resource plan for each project.
RVP_Projects	<a href="#">page 652</a>	Contains project details about open and closed projects.
RVP_ProjectsByGroup	<a href="#">page 653</a>	Shows which projects are in each access group.
RVP_ProjectStatusHistory	<a href="#">page 654</a>	Contains status history for projects that have at least one status message.
RVP_ProjectTeamMembers	<a href="#">page 655</a>	Contains details about project team members assigned to projects.
RVP_RelatedProjects	<a href="#">page 655</a>	Contains details about relationship conflicts between projects.
RVP_StageLength	<a href="#">page 655</a>	Contains the number of days it takes to complete each stage in each project.
RVP_TimesheetEntries	<a href="#">page 656</a>	Contains timesheet entry and approval details.

Reporting View	See	Description
RVP_UserAssignments	<a href="#">page 657</a>	Contains information about which assignments each user is assigned to.
RVP_UserProjects	<a href="#">page 657</a>	Contains user details for each project.
RVP_WorkflowHistory	<a href="#">page 658</a>	Contains the workflow history for deliverables and activities within projects.

## Non-Project Reporting Views (RV\_) Reference

The following tables list the database columns within the standard Accolade reporting views that access information not related to projects.

**RV\_ActivityTemplateUse** - Cross references activity templates to their models.

Column Name	Data Type	Notes
TemplateID	Number	
TemplateName	String	
TemplateType	String	
Category	String	
TemplateCreatedOn	Date	
TemplateCreatedBy	String	
TemplateUploadedOn	Date	
TemplateUploadedBy	String	
ProcessModelID	Number	
ProcessModelName	String	
PMActivityID	Number	
PMActivityName	String	
TemplateSourceName	String	

**RV\_Classes** - Contains details about classes and where they are available.

Column Name	Data Type	Notes
ClassID	Number	
ClassName	String	
ClassSystemName	String	
ClassDescription	String	
ProcessType	String	
ClassEmailNotification	Number	1
ClassInMyProjects	Number	1
ClassInMyAssignments	Number	1
ClassInMSOffice	Number	1

Column Name	Data Type	Notes
ClassInGateLineup	Number	2
ClassRank	Number	
IsActive	Number	1

**RV\_ClassReasonLists** - Cross references classes with their lists of events and reasons.

Column Name	Data Type	Notes
ClassID	Number	
ClassName	String	
ClassSystemName	String	
EventID	Number	
EventName	String	
ReasonCode	String	
ReasonName	String	
IsActive	Number	1

**RV\_DeliverableTemplateUse** - Cross references templates and deliverables.

Column Name	Data Type	Notes
TemplateID	Number	
TemplateName	String	
Category	String	
TemplateType	String	
TemplateCreatedOn	Date	
TemplateCreatedBy	String	
TemplateUploadedOn	Date	
TemplateUploadedBy	String	
ProcessModelID	Number	
ProcessModelName	String	
PMDeliverableID	Number	
PMDeliverableName	String	
TemplateSourceName	String	

**RV\_ExcelReportQueries** - Cross references Excel workbooks and their queries.

Column Name	Data Type	Notes
ExcelReportID	Number	
ExcelReportName	String	

Column Name	Data Type	Notes
Category	String	
Query1ID	Number	
Query1Name	String	
Query2ID	Number	
Query2Name	String	
Query3ID	Number	
Query3Name	String	
Query4ID	Number	
Query4Name	String	
Query5ID	Number	
Query5Name	String	
ExcelReportsActive	Number	1
ProjectLevellsActive	Number	1

**RV\_ExcelTemplateUse** - Cross references Excel workbooks and their templates.

Column Name	Data Type	Notes
TemplateID	Number	
TemplateName	String	
Category	String	
TemplateType	String	
TemplateCreatedOn	Date	
TemplateCreatedBy	String	
TemplateUploadedOn	Date	
TemplateUploadedBy	String	
ExcelReportID	Number	
ExcelReportName	String	
ExcelReportCategory	String	
ExcelReportsActive	Number	1
ProjectLevellsActive	Number	1

**RV\_GateDocumentTemplateUse** - Cross references gate documents and the templates they use.

Column Name	Data Type	Notes
TemplateID	Number	
TemplateName	String	
TemplateCategoryName	String	

Column Name	Data Type	Notes
TemplateType	String	
TemplateCreatedOn	Date	
TemplateCreatedBy	String	
TemplateUploadedOn	Date	
TemplateUploadedBy	String	
ProcesModelID	Number	
ProcessModelName	String	
PMGateDocumentID	Number	
PMGateDocumentName	String	

**RV\_ModelMetrics** - Cross references models and their associated metrics.

Column Name	Data Type	Notes
ModelID	Number	
ModelName	String	
ModelDescription	String	
ModellsActive	Number	1
MetricID	Number	
MetricName	String	
MetricSystemName	String	
MetricsRequired	Number	1
MetricOnCreationPage	Number	3
MetricOnMetricsPage	Number	3
MetricOnStatusReport	Number	3

**RV\_PMDelivActivities** - Contains model details about activities, including deliverable details.

Column Name	Data Type	Notes
ProcessModelID	Number	
ProcessModelName	String	
ProcessModelDescription	String	
ProcessModellsActive	Number	1
PhaseID	Number	
StageName	String	
StagePurpose	String	
StageExists	Number	1
GateName	String	
GatePurpose	String	

Column Name	Data Type	Notes
GateExists	Number	1
DeliverableID	Number	
DeliverableName	String	
DeliverableDescription	String	
DeliverableIsCollaborative	Number	1
ActivityID	Number	
ActivityName	String	
ActivityDescription	String	
ActivityIsCollaborative	Number	1
ProcessType	String	
DeliverableRank	Number	
ActivityRank	Number	
AccessRoles	String	

**RV\_PMDeliverables** - Contains model details about deliverables.

Column Name	Data Type	Notes
ProcessModelID	Number	
ProcessModelName	String	
ProcessModelDescription	String	
ProcessModelIsActive	Number	1
PhaseID	Number	
StageName	String	
StagePurpose	String	
StageExists	Number	1
GateName	String	
GatePurpose	String	
GateExists	Number	1
DeliverableID	Number	
DeliverableName	String	
DeliverableDescription	String	
DeliverableIsCollaborative	Number	1
ProcessType	String	
Rank	Number	
AccessRoles	String	

**RV\_PMGateDocuments** - Contains model details about gate documents.

Column Name	Data Type	Notes
ProcessModelID	Number	
ProcessModelName	String	
ProcessModelDescription	String	
ProcessModelsActive	Number	1
PhaseID	Number	
StageName	String	
StagePurpose	String	
StageExists	Number	1
GateName	String	
GatePurpose	String	
GateExists	Number	1
GateDocumentID	Number	
GateDocumentName	String	
GateDocumentDescription	String	
ProcessType	String	
Rank	Number	

**RV\_PMPHases** - Contains model details about stages and gates.

Column Name	Data Type	Notes
ProcessModelID	Number	
ProcessModelName	String	
ProcessModelDescription	String	
ProcessModelsActive	Number	1
PhaseID	Number	
StageName	String	
StagePurpose	String	
StageExists	Number	1
GateName	String	
GatePurpose	String	
GateExists	Number	1
ProcessType	String	

**RV\_ProcessModels** - Contains details about models.

Column Name	Data Type	Notes
ProcessModelID	Number	
ProcessModelName	String	



Column Name	Data Type	Notes
ProcessModelDescription	String	
DateCreated	Date	
CreatedBy	String	
DateUpdated	Date	
UpdatedBy	String	
IsActive	Number	1
ProcessType	String	
ClassID	Number	
ClassName	String	
CreationProcessStartType	String	
MigrationProcessStartType	String	
InitialTab	String	
DefaultOwner	String	4
DefaultAccessGroup	String	4
DefaultCurrencyCode	String	
DefaultCurrencyName	String	
IdeaDeliverable	String	4
Categories	String	
SnapshotProcessModelID	Number	
SnapshotVersion	Number	

**RV\_Queries** - Contains the name and contents of each query.

Column Name	Data Type	Notes
QueryID	Number	
QueryName	String	
QueryText	String	
QueryDescription	String	
Category	String	

**RV\_QueryUsage** - Cross references queries with charts, reports, and Excel workbooks.

Column Name	Data Type	Notes
QueryID	Number	
QueryName	String	
ObjectType	String	
ObjectID	Number	
ObjectName	String	

Column Name	Data Type	Notes
IsActive	Number	1
Category	String	
ProjectLevelsActive	Number	1

**RV\_ReferenceTables** - Contains details about reference tables.

Column Name	Data Type	Notes
RTableID	Number	
RTableName	String	
RTableSystemName	String	
RTableEnabledFieldCodes	Number	
RTableOwner	String	
ROwnerEmail	String	
ROwnerVMAddress	String	
ROwnerID	Number	
RTableDescription	String	
RTableCategory	String	
RTableAccessGroup	String	
RTUploadedOn	Date	
RTColumnNumber	Number	
RTColumnName	String	
RTColumnHeading	String	

**RV\_ReportingViews** - Lists the reporting views available in Accolade.

Column Name	Data Type	Notes
ViewName	String	

**RV\_ReportQueries** - Cross references reports and queries.

Column Name	Data Type	Notes
ReportID	Number	
ReportName	String	
Category	String	
QueryID	Number	
QueryName	String	

Column Name	Data Type	Notes
ReportIsActive	Number	1
ProjectLevellsActive	Number	1

**RV\_ResourceAvailabilities** - Contains availability details for resource pools.

Column Name	Data Type	Notes
ResourceID	Number	
ResourceName	String	
UserID	Number	6
UserEmailAddress	String	6
UserVMAddress	String	6
TimePeriodNumber	Number	
TimePeriodStartDate	Date	
TimePeriodEndDate	Date	
Capacity	Number	
Unavailable	Number	
NetCapacity	Number	
PoolID	Number	
PoolName	String	
PoolsActive	Number	1

**RV\_ResourcePools** - Contains a list of resource pools with their details and owners.

Column Name	Data Type	Notes
PoolID	Number	
Name	String	
Units	String	
OwnerID	Number	
OwnerName	String	
OwnerEmailAddress	String	
OwnerVMAddress	String	
IsActive	Number	1

**RV\_ResourcePoolOwners** - Contains a list of resource pool owners and the pools they own.

Column Name	Data Type	Notes
UserID	String	
UserName	String	

Column Name	Data Type	Notes
UserEmailAddress	String	
UserVMAddress	String	
PoolID	Number	
PoolName	String	
PoolsActive	Number	1

**RV\_Resources** - Contains details about resources.

Column Name	Data Type	Notes
ResourceID	Number	
ResourceName	String	
UserID	Number	
UserEmailAddress	String	
UserVMAddress	String	
PoolID	Number	
PoolName	String	
PoolsActive	Number	1

**RV\_UserAccessLastLogin** - Contains a record of each user's last successful log in to Accolade.

Column Name	Data Type	Notes
UserLogin	String	
UserID	Number	
Name	String	
LastLoginDate	Date	
IPAddress	String	
Language	String	
UserAgent	String	

**RV\_UserAccessLog** - Contains data about user logins to Accolade.

Column Name	Data Type	Notes
LoginDate	String	
UserLogin	String	

---

Column Name	Data Type	Notes
UserID	Number	
Name	String	
LoginResult	String	
IPAddress	String	
Language	String	
UserAgent	String	

**RV\_Users** - Contains details about user accounts defined in Accolade.

Column Name	Data Type	Notes
UserID	Number	
UserLogin	String	
Name	String	
EmailAddress	String	
ChatAddress	String	
Deleted	Number	1
Is Active	Number	1
RoleCode	String	
RoleName	String	

**RV\_UsersByGroup** - Cross references users to access groups.

Column Name	Data Type	Notes
UserID	Number	
UserLogin	String	
Name	String	
AccessGroupName	String	
ParentGroupName	String	
EmailAddress	String	
ChatAddress	String	
Deleted	Number	1

**RV\_UsersByProfile** - Cross references users to security profiles.

Column Name	Data Type	Notes
UserID	Number	
UserLogin	String	
UserName	String	
SecurityProfileName	String	
SecurityProvideActive	Number	1
Deleted	Number	1

**Notes:**

1. If querying these fields in a WHERE clause, you must specify 1 for True and 0 for False.

Example: WHERE ClassInMSOffice = 1

The value is returned as True or False.

- 2. 1 is Always Excluded; 2 is Always Included; 3 is Default to Excluded; 4 is Default to Included.
- 3. 0 is Neither; 1 is Show; 2 is Edit.
- 4. Field is populated only in Idea models.
- 5. Columns whose names begin with "Sys" are maintained for internal Sopheon use and may be re-formatted as necessary in future revisions of Accolade.
- 6. Only populated when the resource is a user defined in the system, versus a general resource.

### Project Reporting Views (RVP\_) Reference

The following tables list the database columns within the standard Accolade reporting views that access project information.

**RVP\_DelegateAssignments** - Shows all assignments delegated to users and who originally owned them.

Column Name	Data Type	Notes
SysProjectID		2
ProjectName	String	
AssignmentID	Number	
AssignmentName	String	
AssignmentType	String	
DelegatorID	Number	
DelegatorName	String	
DelegateID	Number	
DelegateName	String	
DueDate	Date	

**RVP\_MostRecentStatus** - Shows the project's manager (team leader) and most recent status message of each project with at least one status message.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1

Column Name	Data Type	Notes
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeadeEmail	String	
TeamLeaderVM	String	
StatusHistoryDate	Date	
StatusHistoryComment	String	

**RVP\_MSProjectTasks** - Contains details about Microsoft Project tasks and the tasks' project.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
TeamLeaderID	Number	
TeamLeaderName	String	
CurrentPhaseID	Number	
CurrentStageName	String	
CurrentStageLocked	Number	1
InTrouble	Number	1
MSProjTaskID	Number	
MSProjTaskName	String	
MSProjTaskDescription	String	
MSProjTaskStatusCode	Number	
MSProjTaskStatusName	String	
MSProjTaskStatusComment	String	
MSProjTaskOwner	Number	
MSProjTaskOwnerName	String	
MSProjTaskOwnerEmail	String	
MSProjTaskOwnerVMAddress	String	
MSProjTaskPlannedStartDate	Date	
MSProjTaskPlannedFinishDate	Date	
MSProjTaskDeadline	Date	
MSProjTaskRowNumber	Number	
ProcessType	String	

**RVP\_ProcessModelUse** - Cross references projects and models.

Column Name	Data Type	Notes
SysProjectID		2



Column Name	Data Type	Notes
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
ProcessModelID	Number	
ProcessModelName	String	
ProcessType	String	
ProcessModelsActive	Number	1
ProcessModelDeleted	Number	1

**RVP\_ProjectDelivActivities** - Cross references projects with the details of their deliverables and activities.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
TeamLeaderID	Number	
TeamLeaderName	String	
CurrentPhaseID	Number	
CurrentStageName	String	
CurrentStageLocked	Number	1
InTrouble	Number	1
StageName	String	
StageLocked	Number	1
DeliverableID	Number	
DeliverableName	String	
DeliverableDescription	String	
DeliverableIsCollaborative	Number	1
DeliverableStatusCode	Number	
DeliverableStatusComment	String	
DeliverableStatusName	String	
DeliverableOwnerID	Number	
DeliverableOwnerName	String	
DeliverableOwnerEmail	String	
DeliverableOwnerVMAddress	String	
DeliverablePlannedFinishDate	Date	
DeliverableDeadline	Date	
DeliverableContentSource	Number	

Column Name	Data Type	Notes
DeliverableContentSourceName	String	
ActivityID	Number	
ActivityName	String	
ActivityDescription	String	
ActivityIsCollaborative	Number	1
ActivityOwnerID	Number	
ActivityOwnerName	String	
ActivityOwnerEmail	String	
ActivityOwnerVMAddress	String	
ActivityStatusCode	Number	
ActivityStatusName	String	
ActivityStatusNote	String	
ActivityPlannedFinishDate	Date	
ActivityDeadline	Date	
ActivityContentSource	Number	
ActivityContentSourceName	String	
PredecessorName	String	
PredecessorTypeName	String	
PredecessorStageName	String	
ProcessType	String	
DeliverableRank	Number	
ActivityRank	Number	

**RVP\_ProjectDeliverables** - Cross references projects with the details of their deliverables.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
TeamLeaderID	Number	
TeamLeaderName	String	
CurrentPhase	Number	
CurrentStageName	String	
CurrentStageLocked	Number	1
InTrouble	Number	1
StageName	String	
StageLocked	Number	1

Column Name	Data Type	Notes
DeliverableID	Number	
DeliverableName	String	
DeliverableDescription	String	
DeliverableIsCollaborative	Number	1
DeliverableStatusCode	Number	
DeliverableStatusComment	String	
DeliverableStatusName	String	
DeliverableOwner	Number	
DeliverableOwnerName	String	
DeliverableOwnerEmail	String	
DeliverableOwnerVMAddress	String	
PlannedFinishDate	Date	
DeliverableDeadline	Date	
DeliverableContentSource	Number	
DeliverableContentSourceName	String	
PredecessorName	String	
PredecessorTypeName	String	
PredecessorStageName	String	
ProcessType	String	
Rank	Number	

**RVP\_ProjectGateDocuments** - Cross references gate document and their projects.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeaderEmail	String	
TeamLeaderVMAddress	String	
CurrentPhase	Number	
CurrentStageName	String	
CurrentStageLocked	Number	1
InTrouble	Number	1
StageName	String	
StageLocked	Number	1

Column Name	Data Type	Notes
GateOwnerID	Number	
GateOwnerName	String	
GateOwnerEMail	String	
GateOwnerVMAddress	String	
GateName	String	
GateDocumentID	Number	
GateDocumentName	String	
GateDocumentDescription	String	
GateDocumentContentSource	Number	
GateDocumentContentSourceName	String	
ProcessType	String	
Rank	Number	

**RVP\_ProjectHistory** - Contains project events, reasons, and status messages.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
EventDate	Date	
EventType	String	
EventText	String	
Reason	String	
ReasonCode	String	
ReasonName	String	
EventUserName	String	
EventUserLogin	String	
StageName	String	
EventGateNumber	Number	1
EventGateName	String	
FunctionID	Number	
FunctionName	String	
ChangeFromDate	Date	
ChangeToDate	Date	
ChangeFromDecision	String	
ChangeToDecision	String	
ChangeFromName	String	

Column Name	Data Type	Notes
ChangeToName	String	
ChangeFromCurrency	String	
ChangeToCurrency	String	
ChangeToInTrouble	Number	1

**RVP\_ProjectMetrics** - Cross references metric values with project details.

---

**Important!** If Accolade contains more than 5000 projects, you must use a custom view instead of RVP\_ProjectMetrics to report on metric values, or use another reporting method, such as Accolade Office Extensions or Accolade Online Reporting.

---

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeaderEmail	String	
TeamLeaderVM	String	
InTrouble	Number	1
ProjectClosed	Number	1
MetricID	Number	
DisplayName	String	
MetricName	String	3
Category	String	
MetricType	Number	
CurrencyMetric	Number	1
MetricValue	String	
MetricDisplaySequence	Number	
FilterMetric	Number	1
MetricLastUpdatedDateTime	Date	
ProcessType	String	

**RVP\_ProjectMigrationHistory** - Identifies which projects were migrated to other projects.

Column Name	Data Type	Notes
SysProjectID		2

Column Name	Data Type	Notes
ProjectID	Number	
ProjectName	String	
ProjectDesc	String	
ProjectDateCreated	Date	
ProjectDateClosed	Date	
ProjectClosed	Number	1
PromectPMID	Number	
ProjectPMName	String	
ProjectMigratedToID	String	
ProjectMigratedToName	String	
ProjectMigratedToDesc	String	
ProjectMigratedToDateCreated	Date	
ProjectMigratedToDateClosed	Date	
ProjectMigratedToClosed	Number	1
ProjectMigratedToPMID	Number	
ProjectMigratedToPMName	String	
ProjectMigratedFromID	String	
ProjectMigratedFromName	String	
ProjectMigratedFromDesc	String	
ProjectMigratedFromDateCreated	Date	
ProjectMigratedFromDateClosed	Date	
ProjectMigratedFromClosed	Date	
ProjectMigratedFromPMID	Number	
ProjectMigratedFromPMName	String	
Reason	String	
MigratedToDate	Date	

**RVP\_ProjectPhases** - Contains the stage and gate details for projects. Gates with more than one gatekeeper are repeated with only the gatekeeper details changing.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
InTrouble	Number	1
TeamLeaderID	Number	
ProcessModelID	Number	
ProcessModelName	String	
PhaseID	Number	

Column Name	Data Type	Notes
IsCurrentPhase	Number	1
StageName	String	
StagePurpose	String	
StageExists	Number	1
StageLocked	Number	1
GateName	String	
GatePurpose	String	
GateExists	Number	1
GateDate	Date	
GateMeetingPlace	String	
GateDecisionCode	Number	
GateComment	String	
GateConditions	String	
GatePlanDate	Date	
GateDecisionName	String	
GateKeeperPMID	Number	
GateKeeperID	Number	
GateKeeperUserID	Number	
GateKeeperUserName	String	
GateKeeperUserEmail	String	
GateKeeperVMAddress	String	
GateKeeperVote	String	
DateCreated	Date	
ProjectClosed	Number	1
ProcessType	String	

**RVP\_ProjectResourcePlans** - Contains details about resource plans defined for each project.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectResourcePlansActive	Number	1
ProjectPhaseID	Number	
ProjectStageName	String	
StageLocked	Number	1
PoolID	Number	
PoolName	String	

Column Name	Data Type	Notes
ResourceID	Number	
ResourceName	String	
UserID	Number	
TimePeriodNumber	Number	
TimePeriodStartDate	Date	
TimePeriodEndDate	Date	
DemandID	Number	
DemandTypeID	Number	
DemandType	String	
DemandDateCreated	Date	
DemandValue	Number	
DemandIsActive	Number	1

**RVP\_Projects** - Contains details about open and closed projects.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
Description	String	
ProjectCurrencyCode	String	
ProjectCurrencyName	String	
ConversionFactor	Number	
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeaderEmail	String	
TeamLeaderVM	String	
TeamLeaderCanManageTeam	Number	1
InTrouble	Number	1
DateCreated	Date	
CreatedBy	String	
DateClosed	Date	
ProjectClosed	Number	1
CurrentPhaseID	Number	
CurrentStageName	String	
StageLocked	Number	1
ProcessModelID	Number	
ProcessModelName	String	



Column Name	Data Type	Notes
NextGateID	Number	
NextGateName	String	
NextGateMeetingPlace	String	
NextGatePurpose	String	
NextGateDate	Date	
GatePlanDate	Date	
ProcessType	String	
ClassID	Number	
ClassName	String	
IdeaSubmittersName	String	
IdeaSubmittersEMail	String	
AvailableForResubmission	Number	1
DateReturnedToSubmitter	Date	
ExcludeFromLineUp	Number	1
LastGateDecision	String	
LastGateDecisionCode	Number	
LastGateDecisionsComment	String	
PreviousGoConditional	Number	1
ProjectSysIDMigratedFrom	Number	
ProjectSysIDMigratedTo	Number	

**RVP\_ProjectsByGroup** - Details which projects are in each access group.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
AccessGroupName	String	
ParentGroupName	String	
Description	String	
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeaderEmail	String	
TeamLeaderVM	String	
InTrouble	Number	1
DateCreated	Date	
DateClosed	Date	
ProjectClosed	Number	1

Column Name	Data Type	Notes
CurrentPhaseID	Number	
CurrentStageName	String	
StageLocked	Number	1
ProcessModelID	Number	
ProcessModelName	String	
NextGateID	Number	
NextGateName	String	
NextGateMeetingPlace	String	
NextGatePurpose	String	
NextGateDate	Date	
GatePlanDate	Date	
ProcessType	String	
ClassID	Number	
ClassName	String	
IdeaSubmittersName	String	
IdeaSubmittersEMail	String	
AvailableForResubmission	Number	1
DateReturnedToSubmitter	Date	
ExcludeFromLineUp	Number	1

**RVP\_ProjectStatusHistory** - Contains the history of status messages for projects that have at least one status message.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
TeamLeaderID	Number	
TeamLeaderName	String	
TeamLeaderEmail	String	
TeamLeaderVM	String	
InTrouble	Number	1
StatusHistoryDate	Date	
StatusHistoryComment	String	
ProcessType	String	

**RVP\_ProjectTeamMembers** - Contains details about the members of each project team.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
CurrentPhase	Number	
CurrentStageName	String	
StageLocked	Number	1
InTrouble	Number	1
TeamMemberUserID	Number	
TeamMemberName	String	
TeamMemberEmail	String	
TeamMemberVMAddress	String	
TeamMemberDeleted	Number	1
TeamMemberFunction	String	
ProcessType	String	
ProjectClosed	Number	1

**RVP\_RelatedProjects** - Contains details about relationships between projects.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	
LinkType	String	
DependencyType	String	
InConflict	Number	1
ConflictCreatedOn	Date	
ConflictCreatedBy	String	
SysRelatedProjectID	Number	2

**RVP\_StageLength** - Contains the number of days it takes to complete each stage in a project.

Column Name	Data Type	Notes
SysProjectID		2
ProjectID	Number	
ProjectName	String	

Column Name	Data Type	Notes
ProjectClosed	Number	1
ProcessModelID	Number	
ProcessModelName	String	
PhaseID	Number	
StageName	String	
StageLocked	Number	1
StageLength	Number	4
GateDate	Date	
GatePlanDate	Date	
PreviousGateDate	Date	
PreviousGateDecision	String	
PreviousGateDecisionCode	Number	

**RVP\_TimesheetEntries** - Contains information about timesheet entries and approvals.

Column Name	Data Type	Notes
TimesheetID	Number	
StartDate	Date	
EndDate	Date	
OwnerID	Number	
OwnerLogin	String	
OwnerName	String	
StatusID	Number	
[Status]	String	
StatusComment	String	
UpdatedByID	Number	
UpdatedByLogin	String	
UpdatedByName	String	
UpdatedDate	Date	
ApproverID	Number	
ApproverLogin	String	
ApproverName	String	
ApprovalDate	Date	
OriginalApproverID	Number	
OriginalApproverLogin	String	
OriginalApproverName	String	
RowID	Number	
SysProjectID	Number	2

Column Name	Data Type	Notes
ProjectName	String	
RowApproverID	Number	
RowApproverLogin	String	
RowApproverName	String	
RowApprovalDate	Date	
RowOriginalApproverID	Number	
RowOriginalApproverLogin	String	
RowOriginalApproverName	String	
EFS1 to EFS10	String	5
EFN1 to EFN10	Number	5
EFD1 to EFD10	Date	5
EFL1 to EFL10	String	5
EFLS1 to EFLS10	String	5
EFM1 to EFM10	String	5
EntryDate	Date	
EntryValue	Number	

**RVP\_UserAssignments** - Contains information about the assignments assigned to each user.

Column Name	Data Type	Notes
UserID	Number	
UserName	String	
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
AssignmentName	String	
Deadline	Date	
PlannedFinishDate	Date	
Status	String	
StatusComment	String	
AssignmentType	String	

**RVP\_UserProjects** - Cross references user details with the projects to which they are a member.

Column Name	Data Type	Notes
UserID	Number	
UserLogin	String	
Name	String	
EmailAddress	String	
ChatAddress	String	
Deleted	Number	1
SysProjectID		2
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
ProcessType	String	
ClassID	Number	
ClassName	String	

**RVP\_WorkflowHistory** - Contains the history of workflows for each deliverable and activity.

Column Name	Data Type	Notes
SysProjectID	Number	
ProjectID	Number	
ProjectName	String	
ProjectClosed	Number	1
PhaseID	Number	
StageName	String	
DeliverableID	Number	
DeliverableName	String	
ActivityID	Number	
ActivityName	String	
Reauthenticated	Number	1
FunctionName	String	
OwnerID	Number	
OwnerName	String	
EventDate	Date	
EventID	Number	
EventName	String	
DecisionID	Number	
DecisionName	String	
Step	String	
Action	String	
VersionID	Number	
Explanation	String	

**Notes:**

1. If querying these fields in a WHERE clause, you must specify 1 for True and 0 for False.  
 Example: WHERE ClassInMSOffice = 1  
 The value is returned as True or False.
2. Columns whose names begin with "Sys", such as SysProjectID, are maintained for internal Sopheon use and may be re-formatted as necessary in future revisions of Accolade.
3. This is the system name of the metric.
4. Value equals days between previous gate meeting and next gate meeting.
5. Extended fields flagged as available to Timesheet Entry. EFS = String fields, EFN = Number fields, and so on.

## Custom Reporting Views

Create custom views into Accolade data to supplement the standard Accolade views.

To create stable custom views, base each view on existing RV\_ and RVP\_ views rather than SGM tables. RV\_ and RVP\_ views are more stable across Accolade releases, which SGM tables are more likely to change with each Accolade version.



**Caution!** If you create views based on SGM tables, understand that these views might fail when Accolade is upgraded. Sopheon recommends that you create any custom view from an SGM view or MD view.

## Custom Reporting View Requirements

Ensure that your custom views meet the following requirements:

Requirements	Description
<b>File Name</b>	All custom views begin with either CRV_ or CRVP. Custom views using the RV_, RVP_, or other prefixes are dropped during an Accolade upgrade. <ul style="list-style-type: none"> <li>• CRV_ - Use this prefix for views that do not require access group security.</li> <li>• CRVP_ - Use this prefix for views that require access group security, for example, views into project-level data.</li> </ul>
<b>Accolade Permission</b>	Views must have <code>GRANT SELECT ON [dbo].[Name of View] TO [SGM_Write]</code> at the bottom of the view. This allows Accolade permission to access the view.

Requirements	Description
	<p>For example:</p> <pre> Create View dbo.CRVP_ProjectsExample as     SELECT ProjectName,            Description FROM RVP_Projects with (NOLOCK) GO SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON GO <b>GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO [SGM_Write]</b> GO </pre>
<p><b>Lock Prevention</b></p>	<p>You must specify <code>with (NOLOCK)</code> after each view or table declaration. This prevents the view or table from being locked when a user accesses the custom view. A locked view or table may prevent another user from using Accolade.</p> <p>For example:</p> <pre> Create View dbo.CRVP_ProjectsExample as     SELECT ProjectName,            Description FROM RVP_Projects <b>with (NOLOCK)</b> GO SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON GO GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO [SGM_Write] GO </pre>

## Aliases

If the custom view requires that any of the returned columns need to be aliased, then the aliased columns must be aliased without quotes. If they are aliased with quotes, users are not able to use them in their queries in Accolade.

For example:

```

Create View dbo.CRVP_ProjectsExample as
    SELECT ProjectName,
           Description as ProjectDescription
FROM RVP_Projects with (NOLOCK)
GO

```



```

SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON
GO
GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO
[SGM_Write]
GO

```

## Linkable Names

If you want a CRVP\_view to support project names that appear in reports as links to their project (linkable names), return `SysProjectID` and the project's name. These fields are already included in all existing RVP\_views, and a `SELECT` statement returns the column.

For example:

```

Create View dbo.CRVP_ProjectsExample as
SELECT SysProjectID, ProjectName,
      Description
FROM RVP_Projects with (NOLOCK)
GO
SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON
GO
GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO
[SGM_Write]
GO

```

To support linkable names in a CRVP\_view based on SGM tables, alias `ProjectID` in the `SGM_Projects` table as `SysProjectID`. This `ProjectID` is an internal Accolade ID, not the ID entered at project creation.

For example:

```

Create View dbo.CRVP_ProjectsExample as
SELECT P.ProjectID as SysProjectID,
      P.ProjectName,
      P.Description
FROM SGM_Projects P with (NOLOCK),
      SGM_AccessNodes AN with (NOLOCK)
WHERE P.AccessNodeID = AN.AccessNodeID
GO
SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON
GO
GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO
[SGM_Write]
GO

```

## ProjectID

If the CRVP\_ view requires the ProjectID that the user enters at project creation, get the ProjectID in an existing RVP\_ view. As SysProjectID and ProjectID are already included in most RVP\_ Views.

For example:

```
Create View dbo.CRVP_ProjectsExample as
    SELECT SysProjectID,
           ProjectID,
           ProjectName,
           Description
    FROM RVP_Projects with (NOLOCK)
GO
SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON
GO
GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO
    [SGM_Write]
GO
```

To get the ProjectID in a CRVP\_ view based on SGM tables use the ProjectCode column in the SGM\_Projects table. Alias ProjectCode as ProjectID to be consistent with how it is returned everywhere else.

For example:

```
Create View dbo.CRVP_ProjectsExample as
    SELECT P.ProjectID as SysProjectID,
           P.ProjectCode as ProjectID,
           P.ProjectName as ProjectName,
           P.Description as Description
    FROM SGM_Projects P with (NOLOCK),
         SGM_AccessNodes AN with (NOLOCK)
    WHERE P.AccessNodeID = AN.AccessNodeID
GO
SET QUOTED_IDENTIFIER OFF SET ANSI_NULLS ON
GO
GRANT SELECT ON [dbo].[CRVP_ProjectsExample] TO
    [SGM_Write]
GO
```

## Custom Views for Metrics

A custom view that you can query using the substitution token `{metric:P:<metric name>}` must include the columns `MetricID`, `MetricName`, and `MetricValue`. These columns can be found in the `RVP_ProjectMetrics` view and can be joined to a custom view.

**Note:** If you must base a metrics view on SGM tables, contact [Sopheon Customer Support](#).

The following example is for a custom view based on the `RVP_ProjectMetrics` standard view.

For example:

```
Create View dbo.CRVP_ProjectsExample as
SELECT SysProjectID,
       ProjectID,
       ProjectName,
       MetricID,
       MetricName,
       MetricValue
FROM RVP_ProjectMetrics with (NOLOCK)
```



---

## Appendix B

# Reporting Columns by Subject

This section lists the column sets and columns in each Subject available for reports containing Accolade data using any of the following reporting methods:

- Reports created in MS Excel with the Accolade Office Extensions add-in.
- Online reports created within Accolade.

The standard Subjects that are available include the following:

- [Projects](#)
- [Related Projects](#)
- [Reference Tables](#)
- [Resources](#)
- [Users](#)
- [Classes](#)
- [Models](#)
- [Access Groups](#)
- [Metric Definitions](#)
- [Reference Table Definitions](#)
- [Matrix Definitions](#)
- [Time Tracking](#)
- [Project Snapshot History](#)
- [Project Resource Snapshot History](#)
- [Resource Snapshot History](#)

- [Scenario Projects](#)
- [Scenario Resource Plans](#)

Each Subject is divided into several groups of columns that contain similar information. Some column sets may be unavailable if the associated Accolade modules have not been installed.

If the standard Subjects are not sufficient, [Sopheon Client Services](#) can create customized Subjects for you

## Projects Subject

The Projects subject in reporting contains data on project assignments, metric values, project details, team members, matrices, and other project information.

### Project Access Group Information

Column Name	Data Type
Access Group Name	String
Parent Access Group Name	String
System Access Group ID	ID

### Project Activities

Column Name	Data Type
Project Activity Name	String
Project Activity Owner Name	String
Project Activity Owner Changed By	String
Project Activity Owner Changed Date	Date
Project Activity Start Date	Date
Project Activity Start Date Type	List
Project Activity Start Date Offset	Number
Project Activity Deadline	Date
Project Activity Deadline Type	List
Project Activity Deadline Offset	Number
Project Activity Plan Date	Date
Project Activity Function	String
Project Activity Functional Area	String
Project Activity Functional System Name	String
Project Activity Last Published Date	Date

Column Name	Data Type
Project Activity Status	List
Project Activity Status Notes	String
Project Activity Status Changed By	String
Project Activity Status Change Date	Date
Project Activity Published	Boolean
Project Activity Order	Number
Project Activity Is Collaborative	Boolean
Project Activity Predecessor Name	String
Project Activity Predecessor Type	String
Project Activity Predecessor Stage Name	String
Project Activity <extended field name>	Varied, based on field type
System Project Activity ID	ID
System Project Activity Owner ID	ID
System Project Activity Status Code	ID

**Project Deliverables**

Column Name	Data Type
Project Deliverable Name	String
Project Deliverable Owner Name	String
Project Deliverable Owner Changed By	String
Project Deliverable Owner Changed Date	String
Project Deliverable Start Date	Date
Project Deliverable Start Date Type	List
Project Deliverable Start Date Offset	Number
Project Deliverable Deadline	Date
Project Deliverable Deadline Type	List
Project Deliverable Deadline Offset	Number
Project Deliverable Plan Date	Date
Project Deliverable Function	String
Project Deliverable Functional Area	String
Project Deliverable Last Published Date	Date
Project Deliverable Status	List
Project Deliverable Status Notes	String

Column Name	Data Type
Project Deliverable Status Changed By	String
Project Deliverable Status Change Date	Date
Project Deliverable Published	Boolean
Project Deliverable Order	Number
Project Deliverable Is Collaborative	Boolean
Project Deliverable Predecessor Name	String
Project Deliverable Predecessor Type	String
Project Deliverable Predecessor Stage Name	String
Project Deliverable <extended field name>	Varied, based on field type
System Project Deliverable ID	ID
System Project Deliverable Owner ID	ID
System Deliverable Status Code	ID

### Project Details

Column Name	Data Type
Project Name	String
Project Thumbnail	Image
Project Description	String
Project Currency Code	List
Project Currency Name	List
Project Currency Conversion Factor	Number
Project ID	ID
Project Process Type	List
Project Class	List
Project Model Name	String
Project Creation Date	Date
Project Created By	String
Project Manager Name	String
Project Manager Can Manage Team	Boolean
Project Start Date	Date
Project End Date	Date
Project Duration	Number
Project Last Gate Decision	List



Column Name	Data Type
Project Current Stage Name	String
Project Is In Trouble	Boolean
Project Most Recent Status Report Date	Date
Project Most Recent Status Report Submitter Name	String
Project Most Recent Status Report Text	String
Project Excluded from Line-ups	Boolean
Project Closed	Boolean
Project Closed Date	Date
Project Enforce Project Security	Boolean
Idea Submitter Name	String
Migrated-from Project Name	String
System Project ID	ID
System Project Rank	ID
System Project Manager ID	ID
System Project Current Phase ID	ID
System Project Last Gate Decision Code	ID
System Project Model ID	ID
System Migrated-from Project ID	ID

### Project Extended Project Data

Column Name	Data Type
Extended Project Data 1...10*	String

\* A single column for each Extended Project Data metadata field available in the project. For example, Extended Project Data 1, Extended Project Data 2, etc. The name set for the column in the process model the project uses is used in the compiled report.

### Project Gate Documents

Column Name	Data Type
Project Gate Document Name	String
Project Gate Document Published	Boolean
Project Gate Document Order	Number

### Project Gatekeepers

Column Name	Data Type
Project Gatekeeper Name	String
Project Gatekeeper Function (String)	String
Project Gatekeeper Function (List)	List
Project Gatekeeper Vote	String
Project Gatekeeper Vote Comments	String
System Project Gatekeeper ID	ID

### Project History

Column Name	Data Type
Event Date	Date
Event Type	List
Event Reason	List
Event Reason Code	List
Event Reason Name	List
Event User Name	String
Event User Login	String
Event Stage Number	Number
Event Stage Name	String
Event Gate Number	Number
Event Gate Name	String
Event Text	String
Event Function Name	List
Change-from Date	Date
Change-to Date	Date
Change-from Decision	List
Change-to Decision	List
Change-from Project Name	String
Change-to Project Name	String
Change-from Name	String
Change-to Name	String
Change-from Currency Code	List

Column Name	Data Type
Change-to Currency Code	List
Change-to In Trouble Flag	Boolean
System Event User ID	ID
System Change-from User ID	ID
System Change-to User ID	ID

## Project Link Rules

Column Name	Data Type
Rule Name	String
Rule Link Type	List
Rule Model	List
Rule Condition Metric	List
Rule Condition Metric Value	String
Rule Condition Source Metric	List
System Link Type ID	ID
System Model ID	ID
System Rule Metric ID	ID
System Rule Source Metric ID	ID

## Project Related Projects

Column Name	Data Type
Related Project System Project ID	ID
Related Project System Link Type ID	ID
Related Project Link Type Name	List
Related Project In Conflict	Boolean
Related Project Conflict Created On*	Date
Related Project Conflict Created By*	String
Related Project Dependency Left Date Type Name	String
Related Project Dependency Left Date Name	String
Related Project Dependency Right Date Type Name	String

Column Name	Data Type
Related Project Dependency Right Date Name	String
Related Project Dependency Left Date	Date
Related Project Dependency Right Date	Date

\* Indicates who created the original conflict, and when. If a correction is made to try to resolve the conflict, but a conflict still exists, only the original conflict information is reported.

### Project Resource Plans

Column Name	Data Type
Project Resource Pool Name	String
Project Resource Name	String
Project Period Start Date	Date
Project Period End Date	Date
Project Resource Demand Type	List
Project Resource Demand Curve	List
Project Resource Demand Multiplier	Number
Project Resource Demand Value	Number
Project Resource Demand Is Active	Boolean
System Project Resource Pool ID	ID
System Project Resource ID	ID
System Project Resource Period ID	ID
System Project Resource Demand Type ID	ID
Resource Plan Effective Time Period ID	ID
Resource Plan Effective Time Period	String

### Project Security List - <security list name>

There can be up to five security lists.

Column Name	Data Type
<list name> Selected Value Name	String
<list name> Selected Level Name	List
<list name> <level 1 name>	List (from 1 to 10 levels)

## Project Stages and Gates

Column Name	Data Type	Additional Notes
Project Stage Exists	Boolean	
Project Stage Name	String	
Project Stage Relative Position	List	For each stage in the report, shows the relationship to the current stage by returning an item from the list: Past, Previous, Current, Next, Future.
Project Stage Duration	Number	Days from the last gate date to the next gate date.
Project Stage Locked	Boolean	
Project Gate Exists	Boolean	
Project Gate Name	String	
Project Gate Owner Name	String	
Project Gate Date	Date	
Project Gate Date Metric Name	String	Gate date metric name will only display in the report if the gate is calculated by its associated metric.
Project Gate Decision	List	
Project Gate Meeting Place	String	
Project Gate Notes	String	
Project Gate Conditions	String	
Project Gate Plan Date	Date	
Project Gate Relative Position	List	For each gate in the report, shows the relationship to the next gate by returning an item from the list: Past, Previous, Next, Future.
System Project Phase ID	ID	
System Project Gate Owner ID	ID	
System Gate Decision Code	ID	

## Project Team Members

Column Name	Data Type
Project Team Member Name	String

Column Name	Data Type
Project Team Member Function (String)	String
Project Team Member Function (List)	List
System Team Member ID	ID
Project Team Member Is Primary	Boolean

### MS Project Tasks

Column Name	Data Type
MS Project Task Name	String
MS Project Task Owner Name	String
MS Project Task Description	String
MS Project Task Deadline	Date
MS Project Task Planned Start Date	Date
MS Project Task Planned Finish Date	Date
MS Project Task Status	List
MS Project Task Status Notes	String
MS Project Task Status Changed By	String
MS Project Task Change Date	Date
MS Project Task Row Number	Number
System MS Project Task ID	ID
System MS Project Task Owner ID	ID
System MS Project Task Status Code	ID

### Metric Change History

Column Name	Data Type
Metric Name	String
Metric System Name	String
Metric Category	String
Updated By	String
Updated On	Date
Update Source	String
Value Before Update	Varied, based on metric type
Value After Update	Varied, based on metric type

Column Name	Data Type
System Metric ID	ID
System Updated By ID	ID
System Updated Source ID	ID

## Trended Metric History

Column Name	Data Type
Change Source Name	String
Change Event Date	Date
Stage ID	ID
Trended - <i>&lt;Metric Name&gt;</i> *	String

\* Each metric that is set to **Track History** and is set as **Available to Reporting** is listed as an available column in the Trended Metric History column set.

## Matrix - *<matrix name>*

Each Matrix column set contains the metrics columns that are in the matrix. More than one matrix may be listed. Matrices are specific to each company; therefore, there is not a standard set of column names.

## *<metric category names>*

Metrics that are available to the Table Wizard are listed under subheadings that reflect the metric categories. Metrics are specific to each company; therefore, there is not a standard set of column names.

## Related Projects Subject

The Related Projects subject in reporting contains the names of each project link type and any conflicts for those that dependent on another project.

Column Name	Data Type
System Link Type ID	ID
Link Type Name	List
System Link From Project ID	ID
System Link to Project ID	ID
Related Project in Conflict	Boolean
Related Project Conflict Created On*	Date

Column Name	Data Type
Related Project Conflict Created By*	String
Dependency Left Date Type Name	String
Dependency Left Date Name	String
Dependency Right Date Type Name	String
Dependency Right Date Name	String
Dependency Left Date	Date
Dependency Right Date	Date

\* Indicates who created the original conflict, and when. If a correction is made to try to resolve the conflict, but a conflict still exists, only the original conflict information is reported.

## Reference Tables Subject

The Reference Tables subject in reporting contains columns within each reference table. Reference tables are unique to each company; therefore, there is not a standard set of column names.

**Note:** The Reference Tables subject is not available in the Report Generator.

To determine what tables and columns have been created in your company, either go to the Reference Tables page in Accolade or create a report selecting the [Reference Tables Definitions](#) subject.

## Resources Subject

The Resources subject in reporting contains data about Resource Planning.

### Pool Security List: (*security list name*)

Column Name	Data Type
<list name> Selected Value Name	String
<list name> Selected Level Name	List
<list name> <level name>	List (from 1 to 10 levels)

### Resource Capacities

Column Name	Data Type
Resource Capacity Start Date	Date
Resource Capacity End Date	Date



Column Name	Data Type
Resource Capacity	Number
Resource Capacity Unavailable	Number
System Resource Period ID	ID

## Resource Demands

Column Name	Data Type
Resource Demand Project Name	String
Resource Demand Project Stage Name	String
Resource Demand Start Date	Date
Resource Demand End Date	Date
Resource Demand Type	List
Resource Demand Curve	String
Resource Demand Multiplier	Number
Resource Demand Value	Number
Resource Demand Is Active	Boolean
System Resource Demand Project ID	ID
System Resource Demand Project Phase ID	ID
System Resource Demand Type ID	ID
Resource Demand Effective Time Period ID	ID
Resource Demand Effective Time Period	String

## Resource Pools

Column Name	Data Type
Resource Pool Name	String
Resource Pool Owner Name	String
Resource Pool Is Active	Boolean
Resource Pool Unit of Measure	String
System Resource Pool ID	ID
System Resource Pool Owner ID	ID
<extended field name>	Varied, based on field type

## Resources

Column Name	Data Type
Resource Name	String
Resource System Name	String
Resource Account Status*	See footnote
System Resource Pool Member ID	ID
System Resource Pool Member User ID	ID

\* The **Resource Account Status** column is obsolete. It is included only for backwards compatibility and will be removed in a future Accolade release.

## Users Subject

The Users subject in reporting contains information about user accounts, their setup, and their project assignments.

### User Details

Column Name	Data Type
User Name	String
User Login	String
User Email Address	String
User Chat Address	String
User Default View Name	String
Language	String
Date Format Code	String
Enable Auto Search	Boolean
User Account Status	Boolean
User Active	Boolean
Delegate Name	String
Delegate Email Address	String
Delegate Chat Address	String
Can Update All My Work	Boolean
User Default View Name	String
Delegate Start Date	Date
Delegate End Date	Date

Column Name	Data Type
Expiration Date	Date
System User ID	ID
System User Default View ID	ID
<extended field name>	Varied, based on field type

**User Project Assignments**

Column Name	Data Type
User Project Name	String
User Assignment Type	List
User Assignment Name	String
User Assignment Status	String
User Assignment Deadline	Date
User Assignment Project Closed	Boolean
System User Project ID	ID

**User Roles**

Column Name	Data Type
User Role Name	List
System User Role ID	ID

**User Security List: <security list name>**

Column Name	Data Type
<list name> Selected Value Name	String
<list name> Selected Level Name	List
<list name> <level name>	List (from 1 to 10 levels)

**Classes Subject**

The Classes subject in reporting contains data on class attributes used to organize process models.

## Class Details

Column Name	Data Type
Class Name	String
Class System Name	String
Class Description	String
Class Process Type	List
Class Order	Number
Class Active	Boolean
Enable Email Notifications	Boolean
Include in Work Pod	Boolean
Include in Save to Accolade	Boolean
Include in Resource Editor	Boolean
Include in Portfolio Optimizer	Boolean
Include in Planning	Boolean
Reporting Visibility	List
Class Icons	String
IsPlanning	Boolean
IsPortfolio	Boolean
System Class ID	ID
System Planning Process Model ID	ID

## Class Reason Codes

Column Name	Data Type
Event Name	List
Event Reason Code	List
Event Reason Name	List
Event Reason Active	Boolean
System Event ID	ID

## Models Subject

The Models subject in reporting contains data about model details, stages and gates, deliverables, activities, and gatekeepers assigned to the model.

## Model Activities

Column Name	Data Type
Model Activity Name	String
Model Activity Description	String
Model Activity Enforce Function on User Selection	Boolean
Model Activity Function	List
Model Activity Function System Name	List
Model Activity Functional Area	List
Model Activity Start Date Type	List
Model Activity Start Date Offset	Number
Model Activity Deadline Type	List
Model Activity Deadline Offset	Number
Model Activity Template Name	String
Model Activity Template Created On	Date
Model Activity Template Created By	String
Model Activity Template Uploaded On	Date
Model Activity Template Uploaded By	String
Model Activity Linked TO	String
Model Activity Publish On Upload	List
Model Activity Access Roles	List
Model Activity Workflow Template Name	String
Model Activity Workflow Template Created On	Date
Model Activity Workflow Template Created By	String
Model Activity Workflow Template Uploaded On	Date
Model Activity Workflow Template Uploaded By	String
Model Activity Allows Version Deletion	Boolean
Model Activity Order	Number
Model Activity Is Collaborative	Boolean
Model Parent Deliverable Name	String
System Activity ID	ID
System Activity Template Creator ID	ID
System Activity Template Uploader ID	ID

## Model Deliverables

Column Name	Data Type
Model Deliverable Name	String
Model Deliverable Description	String
Model Deliverable Enforce Function on User Selection	Boolean
Model Deliverable Function	List
Model Deliverable Function System Name	List
Model Deliverable Functional Area	List
Model Deliverable Start Date Type	List
Model Deliverable Start Date Offset	Number
Model Deliverable Deadline Type	List
Model Deliverable Deadline Offset	Number
Model Deliverable Template Name	String
Model Deliverable Template Created On	Date
Model Deliverable Template Created By	String
Model Deliverable Template Uploaded On	Date
Model Deliverable Template Uploaded By	String
Model Deliverable Linked TO	String
Model Deliverable Publish On Upload	List
Model Deliverable Access Roles	List
Model Deliverable Workflow Template Name	String
Model Deliverable Workflow Template Created On	Date
Model Deliverable Workflow Template Created By	String
Model Deliverable Workflow Template Uploaded On	Date
Model Deliverable Workflow Template Uploaded By	String
Model Deliverable Is Required	Boolean
Model Deliverable Allows Version Deletion	Boolean
Model Deliverable Routing Method	List
Model Deliverable Order	Number

Column Name	Data Type
Model Deliverable Is Collaborative	Boolean
System Deliverable ID	ID
System Deliverable Template Creator ID	ID
System Deliverable Template Uploader ID	ID

## Model Details

Column Name	Data Type
Model Name	String
Model Description	String
Model Process Type	List
Model Class	List
Model Active	Boolean
Model Deleted	Boolean
Model Related Document Categories	String
Model Default Project Manager Required On Create	Boolean
Model Default Project Manager Metric Name	List
Model Default Access Group Metric Name	List
Model Project Name Metric Name	String
Model Project ID Metric Name	String
Model Default Idea Manager	String
Model Default Idea Access Group	String
Model Default Idea Currency Code	List
Model Default Idea Currency Name	List
Model Enforce Project Security	Boolean
Model Gates Page set to read-only	Boolean
Model DTIC Support Enabled	Boolean
System Model ID	ID
System Class ID	ID
System Model Default Idea Manager ID	ID
System Model Default Access Group ID	ID
System Model Default Project Manager Metric ID	ID

Column Name	Data Type
System Model Default Portfolio Model ID	ID
System Model Default Access Group Metric ID	ID
Enforce Function For Team Selection	Boolean
Prevent Delete Versions	Boolean

### Model Gate Documents

Column Name	Data Type
Model Gate Document Name	String
Model Gate Document Description	String
Model Gate Document Template Name	String
Model Gate Document Allows Version Deletion	Boolean
Model Gate Document Order	Number
System Gate Document ID	ID

### Model Link Rules

Column Name	Data Type
Rule Name	String
Rule Link Type	List
Rule Model	List
Rule Condition Metric	List
Rule Condition Metric Value	String
Rule Condition Source Metric	List
System Link Type ID	ID
System Model ID	ID
System Rule Metric ID	ID
System Rule Source Metric ID	ID

### Model Gatekeepers

Column Name	Data Type
Model Gatekeeper Name	String
Model Gatekeeper Function (String)	String
Model Gatekeeper Function (List)	List



Column Name	Data Type
Model Gatekeeper Enforce Function on User Selection	Boolean
System Gatekeeper ID	ID

### Model Metrics

Column Name	Data Type
Metric Name	String
Metric System Name	String
Metric Required	Boolean
Metric Show In Planning	Boolean
Metric Usage - Creation	List
Metric Usage - Metrics	List
Metric Usage - Status Report	List
Metric Usage - Portfolio	List
System Metric ID	ID

### Model Reports

Column Name	Data Type
Report Name	String
Report Type	List
System Report ID	ID

### Model Restricted Access Groups

Column Name	Data Type
Restricted Access Group ID	ID
Restricted Access Group Name	String

### Model Stages and Gates

Column Name	Data Type
Model Stage Exists	Boolean
Model Stage Name	String
Model Stage Description	String

Column Name	Data Type
Model Gate Exists	Boolean
Model Gate Name	String
Model Gate Description	String
Model Gate Date Set on Project Creation	Boolean
Model Gate Date Required on Project Creation	Boolean
Model Gate Date Metric Name	String
Model Gate Date Minimum Metric ID	ID
Model Gate Date Minimum Metric Name	String
Model Gate Date Maximum Metric ID	ID
Model Gate Date Maximum Metric Name	String
Model Gate Layout Name	String
System Phase ID	ID
System Model Gate Layout ID	ID

### Model Layouts

Column Name	Data Type
System Model Layout ID	ID
Model Layout Name	String

### Access Groups Subject

The Access Groups subject in reporting contains data about projects and users within each access group.

#### Access Group Details

Column Name	Data Type
Access Group Name	String
Parent Access Group Name	String
System Access Group ID	ID

#### Project Details

Column Name	Data Type
Project Name	String

Column Name	Data Type
Project Thumbnail	Image
Project Description	String
Project Currency Code	List
Project Currency Name	List
Project Currency Conversion Factor	Number
Project ID	ID
Project Process Type	List
Project Class	List
Project Model Name	String
Project Creation Date	Date
Project Created By	String
Project Manager Name	String
Project Start Date	Date
Project End Date	Date
Project Duration	Number (of days)
Project Last Gate Decision	List
Project Current Stage Name	String
Project is In Trouble	Boolean
Project Most Recent Status Report Date	Date
Project Most Recent Status Report Submitter Name	String
Project Most Recent Status Report Text	String
Project Excluded from Line-Ups	Boolean
Project Closed	Boolean
Project Closed Date	Date
Idea Submitter Name	String
Migrated-from Project Name	String
System Project ID	ID
System Project Rank	Number
System Project Manager ID	ID
System Current Phase ID	ID
System Last Gate Decision Code	ID
System Project Model ID	ID
System Migrated-from Project ID	ID

## Reference Table Details

Column Name	Data Type
Table Display Name	String
Table System Name	String
Table Description	String
Table Category Name	String
Table Owner Name	String
Unique Row Identifiers	Boolean
Is Globally Visible	Boolean
System Table ID	ID
System Table Owner ID	ID

## User Details by Group

Column Name	Data Type
User Name	String
User Login	String
User Email Address	String
User Chat Address	String
System User ID	ID

## Metric Definitions Subject

The Metric Definitions subject in reporting contains details about the metrics defined in the system. It does not contain metric values.

## Metric Details

Column Name	Data Type
Metric Display Name	String
Metric System Name	String
Metric Description	String
Metric Category	String
Metric Data Type	List
Metric Relative Date Period	List
Metric Relative to Date	String

Column Name	Data Type
Is Filter Metric	Boolean
Is Searchable	Boolean
Is Report Metric	Boolean
Is Matrix Metric	Boolean
Is Rich Text	Boolean
Available to Portfolio Editor	Boolean
Portfolio Optimizer Usage	String
Initialized from Metric Name	String
Metric Order	Number
Metric Active	Boolean
Metric Query	String
Tracking History	Boolean
Reference Table	String
Reference Table Column	String
Reference Table Filters	String
Metric List Values	String
Available To My Work	Boolean
Available To Workflow Lineup	Boolean
System Metric ID	ID

## Model Details

Column Name	Data Type
Model Name	String
Model Process Type	List
Model Class	List
Model Active	Boolean
Metric Required	Boolean
Model Show In Planning	Boolean
Model Usage - Creation	List
Model Usage - Metric	List
Model Usage - Status Report	List
Model Usage - Portfolio	List
System Model ID	ID

## Metric Restricted Roles

Column Name	Data Type
System Role ID	ID
Role Name	String

## Matrix Details

Column Name	Data Type
Matrix Name	String
Matrix Description	String
Matrix Category	String
Matrix Active	Boolean
System Matrix ID	ID

## Reference Table Definitions Subject

The Reference Table Definitions subject in reporting contains details about reference tables, their columns, and metric identifiers that may be defined within a reference table.

### Reference Table Access Group Information

Column Name	Data Type
Access Group Name	String
Parent Access Group Name	String
System Access Group ID	ID

### Reference Table Columns

Column Name	Data Type
Column Number	Number
Column Display Name	String
Column System Name	String
Column Data Type	List
Column Numeric Mask	String

## Reference Table Details

Column Name	Data Type
Table Display Name	String
Table System Name	String
Table Description	String
Table Category Name	String
Table Owner Name	String
Unique Row Identifiers	Boolean
Is Globally Visible	Boolean
Available To Reporting	Boolean
System Table ID	ID
System Table Owner ID	ID

## Matrix Definitions Subject

The Matrix Definitions subject in reporting contains details about a matrix and its associated metrics and models.

### Matrix Details

Column Name	Data Type
Matrix Display Name	String
Matrix System Name	String
Matrix Description	String
Matrix Category	String
Matrix Order	Number
Available to Reporting	Boolean
Matrix Active	Boolean
System Matrix ID	ID
Portfolio Optimizer Usage	String

### Metric Details

Column Name	Data Type
Metric Name	String
Metric Description	String

Column Name	Data Type
Metric Category	String
Metric Active	Boolean
Metric Unique	Boolean
System Metric ID	ID

### Model Details

Column Name	Data Type
Model Name	String
Model Process Type	List
Model Class	List
Model Active	Boolean
System Model ID	ID

## Time Tracking Subject

The Time Tracking subject in reporting contains details about timesheets and approvals.

### Timesheet Details

Column Name	Data Type
Timesheet Owner Name	String
Timesheet Start Date	Date
Timesheet End Date	Date
Timesheet Status	String
Timesheet Status Comment	String
Timesheet Last Updated By Name	String
Timesheet Last Updated Date	Date
Timesheet Approver Name	String
Original Timesheet Approver Name	String
Timesheet approval Date	Date
System Timesheet ID	ID
System Timesheet Owner ID	ID
System Timesheet Status ID	ID
System Timesheet Last Updated By ID	ID



Column Name	Data Type
System Timesheet Approver ID	ID
System Timesheet Original Approver ID	ID

## Timesheet Rows

Column Name	Data Type
Timesheet Row Project Name	String
Resource Pool Name	String
Timesheet Row Approver Name	String
Timesheet Row Original Approver Name	String
Timesheet Row Approval Date	Date
*Timesheet Row String Fields (1-10)	String
*Timesheet Row List Fields (1-10)	String
*Timesheet Row Date Fields (1-10)	Date
*Timesheet Row Multi-Select Fields (1-10)	String
*Timesheet Row Long String Fields	String
*Timesheet Row Number Fields (1-10)	String
System Timesheet Row ID	ID
System Timesheet Row Project ID	ID
System Timesheet Row Approver ID	ID
System Timesheet Row Original Approver ID	ID

\* Columns for extended fields display use the Extended Field Display Name and are only available when they are active in timesheets.

## Timesheet Entries

Column Name	Data Type
Timesheet Entry Date	Date
Timesheet Entry Value	Number

## Project Snapshot History Subject

The Project Snapshot History subject in reporting contains details about snapshots, current project details and details in snapshots, metric values selected for inclusion in snapshots, and current metric values. To include resource snapshot history, use the [Project Resource Snapshot History](#) subject instead.

## Snapshot Details

Column Name	Data Type
Snapshot Name	String
Snapshot Date	Date
Snapshot Description	String
Snapshot Type	String
Snapshot Position - Type	Number
Snapshot Position - Global	Number
System Snapshot ID	ID

## Snapshot Project Details

Column Name	Data Type
Snapshot Project Name	String
Snapshot Project Thumbnail	Image
Project Snapshot Date	Date
Snapshot Project Description	String
Snapshot Project Currency Code	List
Snapshot Project Currency Name	List
Snapshot Project Currency Conversion Factor	Number
Snapshot Project ID	ID
Snapshot Project Process Type	List
Snapshot Project Type	List
Snapshot Project Class	List
Snapshot Project Model Name	String
Snapshot Project Creation Date	Date
Snapshot Project Created By	String
Snapshot Project Manager Name	String
Snapshot Project Last Gate Decision	List
Snapshot Project Current Stage Name	String
Snapshot Project is In Trouble	Boolean
Snapshot Project Most Recent Status Report Date	Date
Snapshot Project Most Recent Status Report Submitter Name	String

Column Name	Data Type
Snapshot Project Most Recent Status Report Text	String
Snapshot Project Start Date	Date
Snapshot Project End Date	Date
Snapshot Project Excluded from Line-ups	Boolean
Snapshot Project Closed	Boolean
Snapshot Project Closed Date	Date
Snapshot Project Idea Submitter Name	String
Snapshot Migrated-from Project Name	String
Snapshot System Project ID	ID
Snapshot System Project Manager ID	ID
Snapshot System Current Phase ID	ID
Snapshot System Last Gate Decision Code	ID
Snapshot System Migrated-from Project ID	ID

**Current Project Details**

Column Name	Data Type
Current Project Name	String
Current Project Thumbnail	Image
Current Project Description	String
Current Project Currency Code	List
Current Project Currency Name	List
Current Project Currency Conversion Factor	Number
Current Project ID	ID
Current Project Process Type	List
Current Project Type	List
Current Project Class	List
Current Project Model Name	String
Current Project Creation Date	Date
Current Project Created By	String
Current Project Manager Name	String
Current Project Last Gate Decision	List

Column Name	Data Type
Current Project Current Stage Name	String
Current Project is In Trouble	Boolean
Current Project Most Recent Status Report Date	Date
Current Project Most Recent Status Report Submitter Name	String
Current Project Most Recent Status Report Text	String
Current Project Start Date	Date
Current Project End Date	Date
Current Project Excluded from Line-ups	Boolean
Current Project Closed	Boolean
Current Project Closed Date	Date
Current Project Idea Submitter Name	String
Current Migrated-from Project Name	String
Current System Project ID	ID
Current System Project Manager ID	ID
Current System Current Phase ID	ID
Current System Process Model ID	ID
Current System Last Gate Decision Code	ID
Current System Migrated-from Project ID	ID

### Snapshot Project Stages and Gates

Column Name	Data Type
Snapshot Project Stage Exists	Boolean
Snapshot Project Stage Name	String
Snapshot Project Stage Relative Position	List
Snapshot Project Stage Duration	Number
Snapshot Project Gate Exists	Boolean
Snapshot Project Gate Name	String
Snapshot Project Gate Date	Date
Snapshot Project Gate Decision	List
Snapshot Project Gate Meeting Place	String
Snapshot Project Gate Notes	String

Column Name	Data Type
Snapshot Project Gate Plan Date	Date
Snapshot Project Gate Relative Position	List
Snapshot System Project Phase ID	ID
Snapshot System Gate Decision Code	ID
Snapshot Project Gate Conditions	String
Snapshot Project Gateowners Name	String
Snapshot System Project Gateowners ID	ID
Snapshot Project Stage Locked	Boolean
Snapshot Project Gate Date Metric Name	String

### Current Project Stages and Gates

Column Name	Data Type
Current Project Stage Exists	Boolean
Current Project Stage Name	String
Current Project Stage Relative Position	List
Current Project Stage Duration	Number
Current Project Gate Exists	Boolean
Current Project Gate Name	String
Current Project Gate Date	Date
Current Project Gate Decision	List
Current Project Gate Meeting Place	String
Current Project Gate Notes	String
Current Project Gate Plan Date	Date
Current Project Gate Relative Position	List
Current System Project Phase ID	ID
Current System Gate Decision Code	ID
Current Project Gate Conditions	String
Current Project Gateowners Name	String
Current System Project Gateowners ID	ID
Current Project Stage Locked	Boolean
Current Project Gate Date Metric Name	String

**Snapshot <metric category>**

Contains snapshots of metric values for metrics in the selected category.

**Current <metric category>**

Contains the current values of metrics in the selected category.

**Matrix <matrix name>**

Each Matrix column set contains the metrics columns that are in the matrix. More than one matrix may be listed. Matrices are specific to each company; therefore, there is not a standard set of column names.

**Project Resource Snapshot History Subject**

The Project Resource Snapshot History subject in reporting contains current project details and details in snapshots, current resource information and snapshot resource information.

**Snapshot Details**

Column Name	Data Type
Snapshot Name	String
Snapshot Date	Date
Snapshot Description	String
Snapshot Type	String
Snapshot Position - Type	Number
Snapshot Position - Global	Number
System Snapshot ID	ID

**Snapshot Project Details**

Column Name	Data Type
Snapshot Project Name	String
Snapshot Project Thumbnail	Image
Project Snapshot Date	Date
Snapshot Project Description	String
Snapshot Project Currency Code	List
Snapshot Project Currency Name	List
Snapshot Project Currency Conversion Factor	Number
Snapshot Project ID	ID

Column Name	Data Type
Snapshot Project Process Type	List
Snapshot Project Type	List
Snapshot Project Class	List
Snapshot Project Model Name	String
Snapshot Project Creation Date	Date
Snapshot Project Created By	String
Snapshot Project Manager Name	String
Snapshot Project Last Gate Decision	List
Snapshot Project Current Stage Name	String
Snapshot Project is In Trouble	Boolean
Snapshot Project Most Recent Status Report Date	Date
Snapshot Project Most Recent Status Report Submitter Name	String
Snapshot Project Most Recent Status Report Text	String
Snapshot Project Start Date	Date
Snapshot Project End Date	Date
Snapshot Project Excluded from Line-ups	Boolean
Snapshot Project Closed	Boolean
Snapshot Project Closed Date	Date
Snapshot Project Idea Submitter Name	String
Snapshot Migrated-from Project Name	String
Snapshot System Project ID	ID
Snapshot System Project Manager ID	ID
Snapshot System Current Phase ID	ID
Snapshot System Last Gate Decision Code	ID
Snapshot System Migrated-from Project ID	ID

**Current Project Details**

Column Name	Data Type
Current Project Name	String
Current Project Thumbnail	Image

Column Name	Data Type
Current Project Description	String
Current Project Currency Code	List
Current Project Currency Name	List
Current Project Currency Conversion Factor	Number
Current Project ID	ID
Current Project Process Type	List
Current Project Type	List
Current Project Class	List
Current Project Model Name	String
Current Project Creation Date	Date
Current Project Created By	String
Current Project Manager Name	String
Current Project Last Gate Decision	List
Current Project Current Stage Name	String
Current Project is In Trouble	Boolean
Current Project Most Recent Status Report Date	Date
Current Project Most Recent Status Report Submitter Name	String
Current Project Most Recent Status Report Text	String
Current Project Start Date	Date
Current Project End Date	Date
Current Project Excluded from Line-ups	Boolean
Current Project Closed	Boolean
Current Project Closed Date	Date
Current Project Idea Submitter Name	String
Current Migrated-from Project Name	String
Current System Project ID	ID
Current System Project Manager ID	ID
Current System Current Phase ID	ID
Current System Process Model ID	ID
Current System Last Gate Decision Code	ID
Current System Migrated-from Project ID	ID



**Snapshot Project Resource Plans**

Column Name	Data Type
Snapshot Project Resource Pool Name	String
Snapshot Project Resource Name	String
Snapshot Project Period Start Date	Date
Snapshot Project Period End Date	Date
Snapshot Project Resource Demand Type	String
Snapshot Project Resource Demand Curve	String
Snapshot Project Resource Demand Multiplier	Number
Snapshot Project Resource Demand Value	Number
Snapshot Project Resource Demand Is Active	String
Snapshot System Project Resource Pool ID	ID
Snapshot System Project Resource ID	ID
Snapshot System Project Resource Period ID	ID
Snapshot System Project Resource Demand Type ID	ID
Snapshot Resource Demand Effective Time Period ID	ID
Snapshot Resource Demand Effective Time Period	Date

**Current Project Resource Plans**

Column Name	Data Type
Current Project Resource Pool Name	String
Current Project Resource Name	String
Current Project Period Start Date	Date
Current Project Period End Date	Date
Current Project Resource Demand Type	String
Current Project Resource Demand Curve	String
Current Project Resource Demand Multiplier	Number
Current Project Resource Demand Value	Number
Current Project Resource Demand Is Active	String
Current System Project Resource Pool ID	ID
Current System Project Resource ID	ID

Column Name	Data Type
Current System Project Resource Period ID	ID
Current Snapshot System Project Resource Demand Type ID	ID
Current Resource Demand Effective Time Period ID	ID
Current Resource Demand Effective Time Period	Date

## Reporting Columns - Resource Snapshot History

The Resource Snapshot History subject in reporting contains details about resource snapshots, resource pools, pool owners, current resources, resource capacities, and resource demands.

### Snapshot Details

Column Name	Data Type
Snapshot Name	String
Snapshot Date	Date
Snapshot Description	String
Snapshot Type	String
Snapshot Position - Type	Number
Snapshot Position - Global	Number
System Snapshot ID	ID

### Snapshot Resource Pools

Column Name	Data Type
Snapshot Resource Pool Name	String
Snapshot Resource Pool Owner Name	String
Snapshot Resource Pool Is Active	Boolean
Snapshot System Resource Pool ID	ID
Snapshot System Resource Pool Owner ID	ID
Snapshot Resource Pool Unit of Measure	String
<extended name> Selected Snapshot String Value	String (from 1 to 10 )
<extended field name> Selected Snapshot Number	Number (from 1 to 10)

Column Name	Data Type
<extended field name> Selected Snapshot Date Value	Date (from 1 to 10)
<extended field name> Selected Snapshot List Value	List (from 1 to 10)
<extended field name> Selected Snapshot Long String Value	Long String (from 1 to 10)
<extended field name> Selected Snapshot Multi-Select List Value	String (from 1 to 10)

## Current Resource Pools

Column Name	Data Type
Current Resource Pool Name	String
Current Resource Pool Owner Name	String
Current Resource Pool Is Active	Boolean
Current System Resource Pool ID	ID
Current System Resource Pool Owner ID	ID
Current Resource Pool Unit of Measure	String
<extended name> Selected Snapshot String Value	String (from 1 to 10 )
<extended field name> Selected Snapshot Number	Number (from 1 to 10)
<extended field name> Selected Snapshot Date Value	Date (from 1 to 10)
<extended field name> Selected Snapshot List Value	List (from 1 to 10)
<extended field name> Selected Snapshot Long String Value	Long String (from 1 to 10)
<extended field name> Selected Snapshot Multi-Select List Value	String (from 1 to 10)

## Snapshot Pool Owners

Column Name	Data Type
Snapshot Pool Owner Name	String
Snapshot System Pool Owner ID	ID

**Current Pool Owners**

Column Name	Data Type
Current Pool Owner Name	String
Current System Pool Owner	ID

**Snapshot Resources**

Column Name	Data Type
Snapshot Resource Name	String
Snapshot Resource System Name	String
Snapshot Resource Account Status	Boolean
Snapshot System Resource Pool Member ID	ID
Snapshot System Resource Pool Member User ID	ID

**Current Resources**

Column Name	Data Type
Current Resource Name	String
Current Resource System Name	String
Current Resource Account Status	Boolean
Current System Resource Pool Member ID	ID
Current System Resource Pool Member User ID	ID

**Snapshot Resource Capacities**

Column Name	Data Type
Snapshot Resource Capacity Start Date	Date
Snapshot Resource Capacity End Date	Date
Snapshot Resource Capacity	Number
Snapshot Resource Capacity Unavailable	Number
Snapshot System Resource Period ID	ID

**Current Resource Capacities**

Column Name	Data Type
Current Resource Capacity Start Date	Date

Column Name	Data Type
Current Resource Capacity End Date	Date
Current Resource Capacity	Number
Current Resource Capacity Unavailable	Number
Current System Resource Period ID	ID

### Snapshot Resource Demands

Column Name	Data Type
Snapshot Resource Demand Project Name	String
Snapshot Resource Demand Project Stage Name	String
Snapshot Resource Demand Start Date	Date
Snapshot Resource Demand End Date	Date
Snapshot Resource Demand Type	List
Snapshot Resource Demand Curve	String
Snapshot Resource Demand Multiplier	Number
Snapshot Resource Demand Value	Number
Snapshot Resource Demand Is Active	Boolean
Snapshot Resource Demand Project ID	ID
Snapshot System Resource Demand Project Phase ID	ID
Snapshot System Resource Demand Type ID	ID
Snapshot Resource Demand Effective Time Period ID	ID
Snapshot Resource Demand Effective Time Period	String
Snapshot Resource Demand System Name	String

### Current Resource Demands

Column Name	Data Type
Current Resource Demand Project Name	String
Current Resource Demand Project Stage Name	String
Current Resource Demand Start Date	Date
Current Resource Demand End Date	Date

Column Name	Data Type
Current Resource Demand Type	List
Current Resource Demand Curve	String
Current Resource Demand Multiplier	Number
Current Resource Demand Value	Number
Current Resource Demand Is Active	Boolean
Current Resource Demand Project ID	ID
Current System Resource Demand Project Phase ID	ID
Current System Resource Demand Type ID	ID
Current Resource Demand Effective Time Period ID	ID
Current Resource Demand Effective Time Period	String
Current Resource Demand System Name	String

## Scenario Projects Subject

The Scenario Projects subject in reporting contains data on scenario projects.

### Scenario Details

Column Name	Data Type
Scenario Name	List
Scenario Public	Boolean
Scenario Creation Date	Date
Scenario Created By	String
Scenario Updated Date	Date
Scenario Updated By	String
Scenario Last Committed Date	Date
Scenario Last Committed By	String
System Scenario ID	ID

### Scenario Project Details

Column Name	Data Type
Scenario Project Name	String

Column Name	Data Type
Scenario Project Thumbnail	Image
Scenario Project Description	String
Scenario Project Project ID	String
Scenario Project Process Type	List
Scenario Project Class	List
Scenario Project Model Name	String
Scenario Project Creation Date	Date
Scenario Project Created By	String
Scenario Project Manager Name	String
Scenario Project Start Date	Date
Scenario Project End Date	Date
Scenario Project Last Gate Decision	List
Scenario Project Current Stage Name	String
Scenario Project is In Trouble	Boolean
Scenario Project Most Recent Status Report Text	String
Scenario Project Closed	Boolean
Scenario Project Is Active	Boolean
Scenario Project Scenario Rank	Number
Scenario Project Access Group Name	String
Scenario Project Parent Access Group Name	String
System Scenario Project ID	ID
System Scenario Project Manager ID	ID
System Scenario Current Phase ID	ID
System Scenario Last Gate Decision ID	ID
System Scenario Project Class ID	ID
System Scenario Project Model ID	ID
System Scenario Project Rank	ID
System Scenario Access Group ID	ID
System Scenario Parent Access Group ID	ID
Acclaim Projects Integration Enabled	Boolean
Acclaim Projects Health Score	Number
Acclaim Projects Project ID	Number

Column Name	Data Type
Schedule Health	Number
Financial Health	Number

### Scenario Project Stages and Gates

Column Name	Data Type
Scenario Project Stage Exists	Boolean
Scenario Project Stage Name	String
Scenario Project Gate Exists	Boolean
Scenario Project Gate Name	String
Scenario Project Gate Date	Date
Scenario System Project Phase ID	ID

### Scenario Portfolio Plans

Column Name	Data Type
Portfolio Planner ID	ID
Portfolio Planner Name	String
Portfolio Planner Description	String
Updated By User ID	ID
Updated By	String
Updated On	Date
Target Metric ID	ID
Target Metric Name	String
Target Metric Goal	Number
Constraint Metric 1 ID	ID
Constraint Metric 1 Name	String
Constraint Metric 1 Limit	Number
Constraint Metric 1 Total	Number
Constraint Metric 2 ID	ID
Constraint Metric 2 Name	String
Constraint Metric 2 Limit	Number
Constraint Metric 2 Total	Number



### Scenario Editors

Column Name	Data Type
Scenario Editor Name	String
Scenario Checked Out	Boolean
System Scenario Editor ID	ID

### Matrix - *<matrix name>*

Each Matrix column set contains the metrics columns that are in the matrix. More than one matrix may be listed. Matrices are specific to each company; therefore, there is not a standard set of column names.

### *<metric category names>*

Metrics that are available to reporting are listed under subheadings that reflect the metric categories. Metrics are specific to each company; therefore, there is not a standard set of column names.

## Scenario Resource Plans Subject

The Scenario Resource Plans subject in reporting contains data on scenario resource plans.

### Scenario Details

Column Name	Data Type
Scenario Name	List
Scenario Public	Boolean
Scenario Creation Date	Date
Scenario Created By	String
Scenario Updated Date	Date
Scenario Updated By	String
Scenario Last Committed Date	Date
Scenario Last Committed By	String
System Scenario ID	ID

### Scenario Resource Pools

Column Name	Data Type
Scenario Resource Pool Name	String
Scenario Resource Pool Unit of Measure	String
System Scenario Resource Pool ID	ID
Extended Field String 1 - 10	String
Extended Field Number 1 - 10	Number
Extended Field Date 1 - 10	Date
Extended Field Long String 1 - 10	String
Extended Field Multi-Select List 1 - 10	String

### Scenario Resources

Column Name	Data Type
Scenario Resource Name	String
System Resource Pool Member ID	ID

**Scenario Resource Capacities**

Column Name	Data Type
Scenario Resource Capacity Start Date	Date
Scenario Resource Capacity End Date	Date
Scenario Resource Capacity	Number
Scenario Resource Capacity Unavailable	Number
System Scenario Resource Period ID	ID

**Scenario Resource Demands**

Column Name	Data Type
Scenario Resource Demand Project Name	String
Scenario Resource Demand Start Date	Date
Scenario Resource Demand End Date	Date
Scenario Resource Demand Curve	String
Scenario Resource Demand Multiplier	Number
Scenario Resource Demand Value	Number
Scenario Resource Demand Is Active	Boolean
Scenario Resource Demand Effective Time Period	String
System Scenario Resource Demand Project ID	ID
System Scenario Resource Demand Effective Time Period ID	ID

**Scenario Editors**

Column Name	Data Type
Scenario Editor Name	String
Scenario Checked Out	Boolean
System Scenario Editor ID	ID



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## Appendix C

# Accolade Parameters

Following installation, configure Accolade using the Sopheon Accolade Administration Console available on the application server, which contains a set of configuration parameters that defines Accolade behavior.

**Note:** Some parameters are also available within Accolade on the **Configuration > Parameters** page. If you configure parameters within Accolade, recycle the application pool for the changes to take effect. Changing parameters using the Administration Console recycles the pool automatically.

### To update a parameter:


1. From the application server's **Start** menu, select the **Sopheon** folder and then select **Accolade Administration Console**.
2. Select **Standard Parameters** in the Administration Console navigation pane.
3. Select a category to filter the list.
4. Select the **Show Advanced** check box to display all parameters.

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**Important!** Advanced parameters are more likely to damage your system if you make an error. Sopheon recommends that you not modify advanced parameters unless you have expert knowledge of Accolade. Parameters marked *Read Only* in the description are included with the advanced parameters but cannot be modified in the console.

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5. For each parameter you want to modify, click in the **Value** column to change the value.

 You can drag the **Name** column (and the console itself) wider to make overlapping parameter names easier to read.

The sections within this appendix describe the parameters available within each category.

## License Keys

Use the license key parameters to enter the keys for optional add-on Accolade features. Sopheon provides these license keys to you or enters them for you in the Administration Console:

- Collaborative Workflow License Key
- Data Analytics License Key
- Extended Project Edit Rights License Key
- Idea Submission License Key
- Innovation Planning License Key
- MS Project Integration Key
- Portfolio Center License Key
- Resource Planning License Key
- Time Tracking License Key

## Mail and Notifications

The following parameters apply to the internal emailing capability within Accolade, including sending notifications about system events by email:

Display Name	Description	Default Value
Enable Notifications*	Enables or disables notifications through email for events such as deliverables not being ready for an upcoming date.	1
Enable Simple Email Support	Enables or disables Simple Email through Accolade.	0
Email Separator	The separator character to use for emails addressed to multiple recipients.	; (semicolon)
Send Empty Schedule Email Notification	Whether or not to send a scheduled email, even if no events have occurred.	0
Send Emails for Late Assignments in Stages Set to Conditional Go	Enables or disables sending emails for assignments that are late in stages that have a corresponding gate decision set to Conditional Go. Conditional Go is available as a gate decision if the <b>Disable Condi-</b>	0

Display Name	Description	Default Value
	<b>tional Go Gate Decision</b> parameter is set to 0.	
Send Scheduled HTML Report Notifications	Enable scheduled send of HTML report notifications.	1
SMTP SSL Connection Mode	<p>SSL Setting for connection to SMTP Server:</p> <p><b>None:</b> Provided for legacy compatibility.</p> <p><b>Opportunistic:</b> Elevates the connection to use TLS encryption immediately after reading the greeting and capabilities of the server, but only if the server supports the STARTTLS extension. This is provided as a compatibility option.</p> <p><b>Forced:</b> Elevates the connection to use TLS encryption immediately after reading the greeting and capabilities of the server. If the server does not support the STARTTLS extension, then the connection will fail. Most Secure option.</p>	0
SMTP SSL Trusted Cert Thumbprint	The thumbprint of the SSL cert used by the SMTP server. Used for troubleshooting connection errors by removing validation against a trusted certificate with a matching thumbprint.	
<b>Advanced Parameters</b>		
Email Address to Send License Information	The email address to which to send license information. Typically an internal support address.	N/A
Last Status Report Send Date	The day of the month that notification status reports were last processed.	N/A
Notification Delivery Return Address *	The email address used to send notification emails from Accolade.	N/A
SMTP Connection String	<i>(Read Only)</i> The SMTP connection string for sending email notifications.	N/A
Allow usage of CallStoredProcedure	Enable usage of CalledStoredProcedure function in Metric Formulas.	0

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Privacy

The following parameter applies to reports generated from Accolade and Accolade Office Extensions:

Display Name	Description	Default Value
Report Privacy Warning Text*	The text included at the top of each report to indicate privacy of the report content (500 characters). Enter the warning text in the language you would like it to display.	Blank
<b>Advanced Parameters</b>		
Enable System Consent Prompt	Whether or not to show the User Consent prompt if users have not previously consented.	Blank

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Process

The following parameters apply to flow of projects from creation through their model structure:

Display Name	Description	Default Value
Allow Document Owners to Set Deadline	Enables or disables document owner's ability to set the deadline date for documents they own. When disabled, Project Managers or Process Managers can set the deadline date for documents within projects.	0
Allow Document Owners to Set Function	Enables or disables document owner's ability to set the function for document they own. When disabled, Project Managers or Process Managers must set the function for documents.	0
Allow Document Owners to Set Start Date	Enables or disables document owner's ability to set the start date for documents they own.	0



Display Name	Description	Default Value
	When disabled, Project Managers or Process can set the start date for documents within projects.	
Allow Project Owner to Set Gate Dates	Enables or disables project owner's ability to update a gate date from the progress graphic on a current or future gate that has the status of Pending Decision.	0
Allow Team Members to Share Assignments	Enables or disables team member's ability to assign themselves as a document owner within a project.	1
Auto-Generate Project IDs*	Enables or disables automatic system generated project IDs. If set to <b>0</b> , project creators enter their own project ID when creating a project.	0
Automatically Publish Submitted Ideas*	Enables or disables the automatic publication of documents attached to submitted ideas.	0
Default New Versions to Published*	<p>Enables or disables the automatic publication of new versions of an existing document.</p> <hr/> <p><b>Important!</b> Process Designers can set publish options for individual deliverables and activities in process models that override this system parameter. Project deliverables and activities with different publish settings than the system parameter, respect the setting in the process model. Activities added to deliverables in projects, however, respect the system parameter.</p> <hr/>	1
Disable Conditional Go Gate Decision	Enables or disables the ability to set a gate decision to Conditional Go. When a decision is set to Conditional Go, one or more condition must be met before the next gate meeting decision. When disabled, Go is the only gate decision that provides approval to proceed to the next project stage.	0

Display Name	Description	Default Value
Disable Link to File	Enables or disables the ability to link a document's source to an external document stored outside of Accolade.	0
Disable Link to Website	Enables or disables the ability to link a document's source to a website.	0
Enforce Project Security for Add Team Member	<p>Determines if the User Select dialog box on a project only includes users who have security access to the project through access group, security list, and security profile settings. This setting applies to adding team members and project managers to a project or planning element. The default setting of <b>0</b> allows the addition of users to a project by exception, outside their security access.</p> <hr/> <p><b>Important!</b> If you enable this parameter, existing projects that contain users assigned outside their security access are not automatically updated. Correct any projects with security concerns manually.</p> <hr/>	0
Number of Days for Gate Meeting Warning*	The number of days prior to a gate meeting to consider assignments incomplete.	7
Restrict Discussions Tab to Project Team	When enabled, restricts the project discussions feature to only the Project Manager and project team members.	0
Show Conditional Go Assignments as Current	Determines if gates set to Conditional Go are shown as current gate in the Word pod.	1
Show Week Number in Calendar Controls*	<p>When enabled, the calendar selection control includes the week number as the first column, and the week starts on Monday instead of Sunday.</p> <p><b>Note:</b> When changing the parameter value, clear distributed cache if you have distributed cache configured</p>	0

Display Name	Description	Default Value
	on your system and then reset IIS to prompt the system to inherit the parameter change.	
<b>Advanced Parameters</b>		
Allow Last Status Report to be Deleted	Enables or disables a user's ability to delete the last status report they submitted.	0
Default Deliverable/Activity Details Dialog Main Content	<i>(Read Only)</i> The default display content when opening the Deliverable/Activity Details dialog box. The default setting displays quick grids if they are available, or versions if the deliverable or activity has no quick grid assigned.	0
Disable Workflow Decline Decision	Enables or disables the ability to decline a decision within a workflow. When set to <b>1</b> , the <b>Decline request to review deliverable</b> option is not available for workflow action owners entering decisions for their workflow actions.	0
Display Extended Fields on User Selector Default	Enables or disables the display of extended fields on the User Selector dialog. When set to <b>1</b> , the extended fields will be displayed.	1
Enable Quick Grids Protected Mode	Enables or disables grids that are set to be protected (view only).	0

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Product Enhancement

The following parameters apply to the product enhancement system:

Display Name	Description	Default Value
Enable Product Enhancement System	Hides or shows Product Enhancement System Icon. When set to <b>1</b> , it is enabled. When set to <b>0</b> ,	1

Display Name	Description	Default Value
Icon	it is disabled.	
Product Enhancement System Visibility	Shows Product Enhancement System Icon for specific roles. Enter the role codes. A blank default value will include all roles.	Blank

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Organization Information

The following parameters apply to organizational information:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Organization Name	When configuring Accolade or upgrading to version 14.2 or higher, this field must be populated with the name of your organization.  <b>Important!</b> Once a name is entered and saved, the information becomes read-only and cannot be changed.	Blank
Integration ID	Customer integration ID for Accolade to connect to Acclaim Projects. This must only be populated if your organization has purchased integration with Acclaim Projects.	Blank
Acclaim Projects URL	Fully qualified URL to the Acclaim Projects website. This must only be populated if your organization has purchased integration with Acclaim Projects.	Blank

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Security

The following parameters apply to security settings:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Encrypt Distributed Cache Entries	If set to <b>1</b> , values stored in the Distributed Cache will be encrypted. When changing the value, restart IIS on all application servers in the load balanced configuration then clear the cache on the Distributed Cache page of the Administration console.  <b>Important!</b> Enabling this parameter impacts application performance.	0
Login Metric	The system name of the metric used for the location login selection list, if you are prompting users for a location when they log in. This metric is a list or multi-select list metric. The configuration of the metric entered here becomes read-only; therefore, Sopheon recommends using a metric whose list values are defined in a reference table, so you can update the metric's values as needed.	Blank
Restrict Administrators From Updating Their Account	If set to <b>1</b> , Administrators cannot update their account through the User Administration page or by importing users when setting up Accolade user accounts.	0
Task Service Password	<i>(Read Only)</i> Encrypted password used when the task service makes a web service call. The credentials are used for authenticating users.	Blank
Task Service User	<i>(Read Only)</i> Username used when the task service makes a web service call. The credentials are used for authenticating users.	Blank

## System

The following parameters apply to system-level settings, such as database and network, and are typically set once at installation:

Display Name	Description	Default Value
Active Directory Enabled	User extended fields sync with Active Directory.	0
Enable Plug-ins	Whether users can load browser plug-ins.	0
Enable User Profile Images*	Enables the ability to add an image to a user account or user profile that displays with a user's name in various locations in Accolade.	1
Maximum Number of Recent Items	The maximum number of entries that display in the Recent Items list displayable from the Accolade title bar.	50
Maximum Searchable Extended Fields	The maximum number of extended fields can be set for user searches.	5
Metrics Recalculation Chunk Size (Integer)	The number of distinct projects to include when completing metric recalculations.  Contact Sopheon Customer Support before changing this setting.	100
Number of Days to Retain Error Logs	The number of days to save logs that contain system error information.	365
Number of Days to Retain User Access Logs	The number of days to save logs that contain user access information.	390
Project Thumbnail Image Height	The height of the project thumbnail image, in pixels.	80
Project Thumbnail Image Width	The width of the project thumbnail image, in pixels.	80
Replace Empty Values	Whether or not null values in Accolade reporting results are returned with values indicating blank or empty results such as [empty]. If this parameter is set to <b>0</b> , number, date, and string metrics that contain no value display as blank in reporting results.	1
Reporting Office Extensions Record Limit	The maximum number of rows returned in a report created using Accolade Office Extensions Query. Must be set to a whole, positive number.	50,000

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Accolade Footer Text	The text displayed in the Accolade page footers. This may be corporate or legal directives, or any text all employees in your company need to see.	Blank
Accolade Header Text	The text displayed above the Accolade main menu bar. This may be corporate or legal directives, or any text all employees in your company need to see.	Blank
Accolade Process Manager Version	<i>(Read Only)</i> The current version and build number for Accolade Process Manager.	x.x.x
Accolade Process Manager Website URL	The website address for Accolade Process Manager.	Blank
Allow Default Landing Page	Allows personalized landing pages to be selected by users.	1
Allow Restricted Project Names to be Visible	Indicates whether project names for projects selected to be hidden, display in Resource Editor and on timesheets for all users regardless of if they are on the project team or have rights to view the project.	0
Anonymous Idea Submission URL	The website address for Idea Submission.	
Application Insights Key	Defines the resource used to aggregate telemetry data.	Blank
Cancel Snapshot in Process	<i>(Read Only)</i> Indicates 1 if a snapshot is in the process of being canceled. Use for troubleshooting purposes.	0
Currency Symbol	Corporate currency symbol displayed in AOR charts and reports.  <b>Important!</b> If users upload files into Accolade that contain different currency symbols not listed here, the value in this parameter will be used instead.	\$
Customization	<i>(Read Only)</i> Indicates if your instance of Accol-	0

Display Name	Description	Default Value
Installed	ade is a customized version. Standard versions display 0.	
Database Filestore Buffer Size	The database filestore buffer size, in bytes.	1024000
Default Domain for Users	The default domain for login when one is not provided.	Blank
Default Search Language ID	The Local ID (LCID) the Accolade search uses.	1033
Enable Autofit Cells on Smart Excel Download	Enables or disables Smart Excel metric/metadata fields to be autofit when downloading Smart Excel document	1
Enable Autoloader Service	<i>(Read Only)</i> Indicates whether the automatic upload service is enabled.	0
Enable Client Macro Events for MS Office Add-In	Enables or disables the support of client-side macros for the Accolade Office Extensions add-in. For example, events that happen before or after saving a document.	0
Enable Customization Extensions	Enables or disables the support for customizations that use the Extension Object.	1
Enable MS Docs Date Time Stamp	Enables or disables using a date/time stamp to distinguish versions of MS Office documents that are opened more than once.	0
Enable Smart PowerPoint Documents	Enables the "smart" functionality in MS PowerPoint documents downloaded from and uploaded to Accolade. If set to <b>0</b> , users can download and upload MS PowerPoint files; however, if the file contains Accolade data, such as field codes, those values do not update.	1
Enable Stakeholders	Whether or not to enable information to be shared with outside stakeholders.	1
Enable Windows Authentication	Enables or disables Windows for user login authentication.	1
Enforce List Value Validation	Indicates if list and multilist values should be validated before saving.	0
Event Log Types to	The types of Windows event log entries to dis-	Application



Display Name	Description	Default Value
Display on Error	play when an error is triggered.	System
Fiscal Year Start Month	<p>The number correlating to the first month of your company's fiscal year. 1 = January, 12 = December. A value of 1 defaults time intervals to calendar year by beginning with January.</p> <p><b>Note:</b> This setting does not affect metric or date calculations. It only determines the time intervals in Gantt views, allowing users to align timelines according to fiscal year or calendar year.</p>	1
Hidden Reference Table Category Name	The name of the category that contains hidden reference tables.	
Idea Management Transfer Directory Location	<i>(Read Only)</i> The path to the directory where idea submission document transfers occur.	
Max Levels in Portfolio Center	The maximum levels of project relationships to show in Dashboards for Accolade.	3
Max Process MultiThreading	<p>The maximum number of threads the Accolade Timed Task Server uses per application server. For example, in an implementation with three application servers, if set to <b>4</b>, up to four threads are created for each application server, for a total of 12. Set to <b>0</b> to automatically set the threads based on the number of cores in the application server.</p> <p>The optimum setting for your Accolade implementation is dependent on your data and your application server/database server configuration. In a load balanced configuration, all servers must be included in the value. Changing this setting can affect other applications running on the database server if the server is a shared resource.</p> <p>If this value is changed after the initial configuration, all application servers will need</p>	0

Display Name	Description	Default Value
	<p>their IIS reset, as well as the Accolade Timed Task Service restarted to update the new setting.</p> <p>Contact Sopheon Customer Support before changing this setting.</p>	
Maximum File Upload Size	The maximum uploaded file size allowed (in bytes). When uploading multiple files, this limit is imposed on each file in the group upload, not the upload as whole.	209715200
Maximum Filter Metrics Allowed	The maximum number of metrics allowed to be designated as filter metrics.	3
Number of Event Logs to Display on Error	The number of Windows Event Log entries to display when an error is triggered.	20
Password Change URL	The URL to a custom web page where users are able to change their local Accolade password. Leave the parameter blank to prevent users from changing their password.	Blank
Pre-Check Office File Readability	Enables or disables the check for the readability of MS Office files before adding them to the system.	0
Project Recalculation Notification Chunk Size	<p>Sets the amount of projects to notify users of processing pending metric calculations from the Task Service. This setting is in bytes, and determines when a project indicates that calculations are processing, and when the <b>Recalculate All</b> button within metric configuration indicates that metric calculations are still processing.</p> <p>Contact Sopheon Customer Support before changing this setting.</p>	100
Related Document Import Load Schedule	<i>(Read Only)</i> The scheduled time for importing related documents using the automatic upload service.	Blank
Rich Text Size Warning	Metric Size to warn the user when they are getting close to the maximum allowed metric size (in MB).	75

Display Name	Description	Default Value
	<b>Important!</b> The value cannot exceed 2 GB as metrics with Rich Text enabled cannot contain more than 2 GB of data.	
SignalR Transport	The SignalR transport mechanism. Separate entries using a pipe (   ) delimiter. Options include: <b>webSockets</b> , <b>foreverFrame</b> , <b>server-SentEvents</b> , and <b>longPolling</b> . Note that the capitalization must match exactly to set the parameter. This parameter is only used in cross domain environments.  Contact Sopheon Customer Support before changing this setting.	Blank
System Delimiter for Lists	The character used to separate items in a list metric when stored as a string.	(pipe)
Transfer Directory Location	<i>(Read Only)</i> The path to the directory in the file system where document transfers occur.	
User Session Data Latency	The amount of time to wait after the Web session has timed out to delete the user session data.	5

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Accolade Portfolio Optimizer

The following parameters apply to the Portfolio Optimizer optional component:

Display Name	Description	Default Value
Portfolio Optimizer Load Requested Demands	Enables or displays requested demands from displaying in Portfolio Optimizer, along with assigned demands.	0
Portfolio Optimizer Waterline Threshold Percent*	The percentage at which to show a warning as resource demand approaches capacity.	90
Prefix for Generic Placeholder	The prefix that begins the name of every generic resource to prevent overbooked icons from dis-	Any

Display Name	Description	Default Value
Resources *	playing in Portfolio Optimizer.	
Warn User When Uploading Data Older than (Days)*	The number of days since data was downloaded to trigger a warning to Portfolio Optimizer users uploading changes from Portfolio Optimizer.	30
<b>Advanced Parameters</b>		
Portfolio Optimizer Data Contract Version	<i>(Read Only)</i> Data contract version for Portfolio Optimizer communication.	x.x
Portfolio Optimizer Minimum Client Version	<i>(Read Only)</i> Minimum Portfolio Optimizer client version compatible with the server.	x.x

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Resource Planning

The following parameters apply to the Resource Planning optional component for Accolade Portfolio Center.

Display Name	Description	Default Value
Allow Multiple Links for an Assigned Pool	Enables or disables whether a single assigned-only pool has links to multiple requested-only pools.	0
Disable Editing on Project Resources Tab	Enables or disables whether the <b>Resources</b> page within a project is read-only.	0
Enable Extended Demand Constraints	Enables or disables Resource Editor filters that match projects to pools when adding demands.	0
Maximum Resource Demand History	The maximum number of demands that can be shown in resource demand history.	0
Maximum Time Periods to Download	The maximum number of time periods that can be downloaded into a Resource Planning Smart Excel document.	200
Minimum Time Periods to Download	The minimum number of time periods that can be downloaded into a Resource Planning Smart Excel document.	12
Resource Planning Total Divisor	<i>(Read Only)</i> The number by which capacity and demand totals should be divided to show average	1

Display Name	Description	Default Value
	monthly capacity or demand over the entire planning period.	
<b>Advanced Parameters</b>		
Number of Buffered Time Periods Back from the Current Period	The number of time periods before the current period that have data loaded into resource planning pages like Resource Editor when the page loads.  <b>Important!</b> Set the value equal to or less than the <b>Periods Back</b> value on the Admin Console when configuring Resource Planning time periods. See the <i>Accolade Installation Guide</i> for more information on setting Resource Planning time periods.	12
Number of Buffered Time Periods Forward from the Current Period	The number of time periods after the current period that will have data loaded into resource planning pages like Resource Editor when the page loads.	60
Resource Planning Time Interval Type	<i>(Read Only)</i> Time interval in each resource planning cell (0 = weeks, 1 = months, 2 = quarters, 3 = years).	1

## Integrations

The following parameters apply to the MS Teams Integration optional component:

Display Name	Description	Default Value
MS Teams Application (client) ID	The Application (client) ID of the application registered in Microsoft Azure Active Directory.	Blank
MS Teams Directory (tenant) ID	The Directory (tenant) ID of the application registered in Microsoft Azure Active Directory (see above). The tenant ID can be a GUID (the ID of your Azure AD instance), for single-tenant applications, or a domain name associated with your Azure AD instance (also for single-tenant applications)	organizations

Display Name	Description	Default Value
	<p>Placeholders can also be used as a tenant ID in place of the Azure AD authority audience enumeration:</p> <ul style="list-style-type: none"> <li>• <i>Organizations</i> for a multitenant application</li> <li>• <i>Consumers</i> to sign in users only with their personal accounts</li> <li>• <i>Common</i> to sign in users with their work and school accounts or their personal Microsoft accounts</li> </ul>	
MS Teams Prompt Type	<p>Specifies how the user should be prompted to authenticate. The prompt parameter can be used to make sure that the End-User is still present for the current session or to bring attention to the request.</p> <p>Space delimited, case sensitive list of ASCII string values that specifies whether the End-User is prompted for reauthentication and consent.</p> <p>Defined values are:</p> <ul style="list-style-type: none"> <li>• <b>none</b> - Do not display any authentication or consent user interface pages. An error is returned if an End-User is not already authenticated or the Client does not have pre-configured consent for the requested Claims or does not fulfill other conditions for processing the request. Cannot be used in combination with other values.</li> <li>• <b>login</b> - Prompt the End-User for reauthentication. If it cannot reauthenticate the End-User, an error is returned.</li> <li>• <b>consent</b> - Prompt the End-User for consent before returning information to the Client. If it cannot obtain consent, an error is returned.</li> </ul>	select_account

Display Name	Description	Default Value
	<ul style="list-style-type: none"> <li><b>select_account</b> - Prompt the End-User to select a user account. This enables an End-User who has multiple accounts to select amongst the multiple accounts that they might have current sessions for. If an account selection choice made by the End-User cannot be obtained, an error is returned.</li> </ul>	
MS Teams Domain Hint	Domain hints are directives that are included in the authentication request from an application. They can be used to accelerate the user to their federated IdP sign-in page. Or they can be used by a multi-tenant application to accelerate the user straight to the branded Azure AD sign-in page for their tenant. If included, leads to a more streamlined user experience. An example of a domain hint would be a domain name such as sopheon.com.	Empty
MS Teams URI Scheme	<p>The default URI Scheme to use for the MS Teams integration. This indicates the user experience when transitioning between Accolade and MS Teams.</p> <p>0 = use the launcher (the Microsoft intermediate step which allows the user to select whether to use the MS Teams App or the web app),</p> <p>1 = msteams scheme (use the MS Teams app),</p> <p>2 = https scheme (use the web app).</p>	1

## MS Project Integration

The following parameters apply to the MS Project Integration optional component:

Display Name	Description	Default Value
MS Project Field for Misc Data	The name of the custom field in MS Project used to store miscellaneous data.	Text26

Display Name	Description	Default Value
MS Project Field for Status	The name of the custom field in MS Project used to store status data.	Text28
MS Project Filed for Status Notes	The name of the custom field in MS Project used to store status notes data.	Text27
MS Project Field for Task ID	The name of the custom field in MS Project used to store task ID data.	Text30
MS Project Field for Task Owner	The name of the custom field in MS Project used to store task owner data.	Text29
MS Project Field for User ID	The name of the custom field in MS Project used to store user ID data.	Text24
MS Project Field for User Login	The name of the custom field in MS Project used to store user login data.	Text25

## Currency

The following parameters apply to the currency in which you do business:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Corporate Currency	<i>(Read Only)</i> Currently selected corporate currency code. Projects can run in a difference currency.	N/A
Corporate Currency Previously Set	<i>(Read Only)</i> Indicates if the corporate currency has been changed.	0

## Timeouts

The following parameters apply the number of seconds the application waits before timing out in various scenarios. These settings are typically only changed for troubleshooting purposes or to accommodate certain hardware implementation:

Display Name	Description	Default Value
Calculated Metric Process Timeout (minutes)	The number of minutes before a running calculation process times out.	60



Display Name	Description	Default Value
Web Session Timeout (minutes)*	The number of minutes of inactivity allowed before a user's Accolade session times out and requires the user to re-enter their user name and password.	60
<b>Advanced Parameters</b>		
Database Default Command Timeout (seconds)	The number of seconds before an ordinary database command times out.	30
Database Filestore Command Timeout (seconds)	The number of seconds before a database filestore command times out.	120
Database Import Command Timeout (seconds)	The number of seconds before a data import times out.	1200
Database Import Transaction Timeout (hh:mm:ss)	The amount of time before a data import database transaction times out.	0:20:00
Database Portfolio Optimizer Command Timeout (seconds)	The number of seconds before a Portfolio Optimizer database command times out.	300
Database Reference Tables Command Timeout (seconds)	The number of seconds before a reference table database command times out.	600
Database Reference Tables Transaction Timeout (hh:mm:ss)	The number of seconds before a reference table transaction command times out.	0:20:00
Database Transaction Timeout (hh:mm:ss)	The amount of time before a database transaction times out.	0:05:00
Distributed Cache Command Timeout (seconds)	The number of seconds before a distributed cache command times out. If you change this setting reset IIS and restart the Accolade Windows Services, except for the cache service.	30
Document Refresh Timeout (seconds)	The number of seconds before the refresh of a document containing field codes times out.	1200
Report Cache Sliding	The amount of time a report will remain in cache	0:00:10

Display Name	Description	Default Value
Expiration Timeout (hh:mm:ss)	after the last time it is accessed.	
Reporting Office Extensions Database Timeout (seconds)	The number of seconds before the SQL database for reporting in Accolade Office Extensions queries time out.	30
Reporting Office Extensions Timeout (minutes)	The number of minutes before reporting in Accolade Office Extensions queries time out.	10
Save to Accolade Timeout (seconds)	The number of seconds before the document being saved via the Accolade Office Extensions times out.	1200
Web API Client Credential Session Timeout (minutes)	The number of minutes before a web API client's session will time out due to inactivity.	60
Database Data Api Command Timeout (seconds)	The number of seconds before a data API command times out.	900

\* This parameter can also be set within Accolade in **Process > Configuration > Parameters**.

## Time Tracking

The following parameters apply to the Time Tracking optional component:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Time Tracking Max Daily Units	The maximum daily value not to be exceeded on a given day when entering time on timesheets.	0
Time Tracking Warn or Block Input Greater than Max Daily Units	Enables or disables the ability to enter time exceeding the daily limit. When set to <b>0</b> , a warning displays when users enter a value greater than the allotted max daily value. When set to <b>1</b> , the system clears cells that contain values greater than the max daily limit, and prevents users from submitting timesheets.	0
Time Tracking Warn or	Enables or disables the ability to enter time on	0

Display Name	Description	Default Value
Block Input on Restricted Days	restricted days. When set to <b>0</b> , a warning displays when users enter time on restricted days. When set to <b>1</b> , the system prevents users from entering time on restricted days.	
Weekly Restricted Days	Day(s) of the week which time cannot be entered on timesheets. 0 = Sunday, 6 = Saturday. Separate entries using a pipe (   ) delimiter.	Blank
Weekly Start Day	<i>(Read Only)</i> The day of the week on which timesheets start. 0 = Sunday, 6 = Saturday.	0

## Dashboards

The following parameters apply to the Dashboards for Accolade optional component:

Display Name	Description	Default Value
Dashboards Server URL	URL of the Accolade Dashboards Server	Blank
<b>Advanced Parameters</b>		
Dashboard Users Group	Name of the User Group used for Dashboards document permissions.	Blank
Dashboards Web Ticket Password	Password of the user used for retrieving the Dashboards web ticket.	Blank
Dashboards Web Ticket User Name	Name of the user used for retrieving the Dashboards web ticket.	Blank

## Excel

The following parameters apply to downloading content such as online reports, metrics, and process model data from Accolade to MS Excel:

Display Name	Description	Default Value
Excel Header Background Color	The background color of the header rows in online reports downloaded to MS Excel.	0276FD
Excel Header Font	The font color of the text in header rows in online	FFFFFF

Display Name	Description	Default Value
Color	reports downloaded to MS Excel.	
Excel Header Is Bold	Sets whether the header text is bold or regular weight in online reports downloaded to MS Excel.	0

## AutoLoader

The following parameters apply to setting the autoloader configuration, and are all read only within the Standard Parameters list. To update autoloader settings, use the Autoloader Configuration pane within the Administration Console:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
FTP Inbox Path	<i>(Read Only)</i> Path to the FTP inbox folder.	Blank
FTP Outbox Path	<i>(Read Only)</i> Path to the FTP outbox folder	Blank
FTP Password	<i>(Read Only)</i> Password for the FTP site.	Blank
FTP Username	<i>(Read Only)</i> Username for the FTP site.	Blank
Local Inbox Path	<i>(Read Only)</i> File path to the local inbox folder.	Blank
Local Outbox Path	<i>(Read Only)</i> File path to the local outbox folder.	Blank
Relay Delay on Error	<i>(Read Only)</i> Length of time in seconds that the service waits before retrying on error.	Blank

## Service Broker

The following parameters apply to the Microsoft SQL Server Service Broker:

Display Name	Description	Default Value
<b>Advanced Parameters</b>		
Service Broker Conversation Lead Time	The number of seconds, prior to the conversation lifetime, before the Service Broker stops sending messages on the conversation. Set the lead time value as less than the lifetime value, as it is intended to warn when approach-	14400

Display Name	Description	Default Value
	ing the lifetime time out.	
Service Broker Conversation Lifetime	The maximum number of seconds before the SQL Service Broker ends the conversation. The lifetime value must exceed the timeout value and should be significantly longer than the time out value to avoid breaching the lifetime conversation end.	86400
Service Broker Conversation Timeout	The number of seconds a conversation is allowed to run before the conversation times out and fires another conversation. For each new message sent on the conversation prior to reaching the time out, Accolade extends the allotted time for the conversation by this value.	60
Service Broker Retry Attempts	The number of retries the Service Broker attempts to complete a request after receiving an error.	10
Service Broker Retry Delay	The amount of time to wait between Service Broker retries (in hh:mm:ss format).	000:00:15

- Automatically Publish Submitted Ideas
- Idea Management Transfer Directory location
- Online Forms Parameter Section



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## Appendix D

# XML for Online Forms

This appendix provides information about the XML elements used to create online forms. The information within the following XML reference assumes that you are familiar with XML and its accepted format.

## XML for Online Forms

This appendix provides information about the XML elements used to create online forms. The information within the following XML reference assumes that you are familiar with XML and its accepted format.

### Requirements for Online Forms XML

An XML file must contain the appropriate declaration and namespace information for Accolade to recognize the file as an online form.

#### XML Declaration

The XML Declaration is the first line in every Accolade XML template. This code allows Accolade and other software to recognize the file as an XML document. It is required and must be exactly as stated below:

```
<?xml version="1.0" encoding="UTF-8"?>
```

#### XML Namespace

A namespace is the name of the collection of named elements in the document. It uniquely identifies the element names used in this document. The root element, **web-document**, contains two namespaces declared in the following text:

```
xmlns:wd="urn:sopheon-com:sgm:webdoc:1"
xmlns="urn:sopheon-com:sgm:webdoc:1"
```

The start tag of the web-document element declares the namespaces using the following format:

```
<wd:web-document
  title="Document Title Text"
  xmlns:wd="urn:sopheon-com:sgm:webdoc:1"
  xmlns="urn:sopheon-com:sgm:webdoc:1">
```

Do not omit or modify the namespace declarations.

The practical effect of having two declarations is that element tags can be written either as `<wd:group>` or as `<group>`.

### web-document

The root element of an online form. Contains all the other elements.

Number of occurrences	Once per document
Parent elements	None
Child elements	<b>group</b>



### Format

```

<wd:web-document
  title="Title of the Online Form"
  xmlns:wd="urn:sopheon-com:sgm:webdoc:1"
  xmlns="urn:sopheon-com:sgm:webdoc:1"
</wd:web-document>

```

### Attributes

Attribute	Editable	Description
title	Yes	The source for the title of the online form. Can contain <a href="#">substitution tokens</a> to display Accolade data.
namespace	No	Written as a declaration, "xmlns=" or "xmlns:wd=" followed by the namespace.

### Example

The following example is of an online form that contains an empty group:

```

<wd:web-document
  title="A Simple Online Form"
  xmlns:wd="urn:sopheon-com:sgm:webdoc:1"
  xmlns="urn:sopheon-com:sgm:webdoc:1">
  <wd:group
    title="This Grid is Empty">
  </wd:group>
</wd:web-document>

```

### group

Creates a grid of data entry rows. A **group** element can contain any mix of **local-entry** and **metric-entry** elements. A form can have more than one grid within it to group like items together.

Parent elements	<b>web-document</b>
Child elements	<b>local-entry, metric-entry</b>

### Format

```

<wd:group
  title="Title of Grid"
  isCollapsible="true"
  isCollapsed="false">
</wd:group>

```

## Attributes

Attribute	Description
title	The source for the grid title. Can contain <a href="#">substitution tokens</a> to display Accolade data.
isCollapsible	Determines if the group contains an Expand/Collapse button in the title row. Defaults to <b>true</b> if not specified.
isCollapsed	Determines if the grid displays as collapsed when the form is opened. This attribute has no effect unless the <b>isCollapsible</b> attribute is set to <b>true</b> . Defaults to <b>false</b> if not specified.

## Example

The following example defines an online form with a grid titled "Project-Critical Metrics" that contains containing a single metric entry:

```
<wd:web-document
  title="A Simple Online Form"
  xmlns:wd="urn:sopheon-com:sgm:webdoc:1"
  xmlns="urn:sopheon-com:sgm:webdoc:1">
  <wd:group
    title="Project-critical Metrics"
    isCollapsible="false">
    <wd:metric-entry>
      name="marketShare"
      title="Market Share"
      metricName="MktShr">
      <wd:type base="number"/>
    </wd:metric-entry>
  </wd:group>
</wd:web-document>
```

## metric-entry

Creates a data entry row within a grid that is linked to a project metric. The row can both display the metric's value and accept a new value to update the metric.

Parent element	<b>group</b>
Child elements	<b>type</b>

### Format

```
<wd:metric-entry
  title="Label of This Row"
  name="metricentry_ID"
  metricName="Accolade_metric's_system_name"
  isRequired="false"
  isEditable="true"
  inputControl="input-control-type"
</wd:metric-entry>
```

### Attributes

Attribute	Description
title	The row title as it displays in the online form within Accolade. Sopheon recommends you use the metric's display name as the title. Can contain <a href="#">substitution tokens</a> to display Accolade data. Defaults to a blank row title if not specified.
name	The source for the row title in the online form XML file. Just be unique within the XML file. Sopheon recommends you use the metric's display name as the title. Can contain <a href="#">substitution tokens</a> to display Accolade data. Defaults to a blank row title if not specified.
metricName	<i>(Required)</i> The project metric system name to which this field is linked.
isRequired	Determines if an entry within this field in the online form is required before saving the form. Defaults to <b>false</b> if not specified.
isEditable	Determines if the field is editable within the online form. Defaults to <b>true</b> if not specified.
inputControl	Determines the type of field, such as a check box or drop-down list. The selection here depends on the data type, for example, a list metric lends itself well to a drop-down list selection field. See " <a href="#">XML Input Controls</a> " on page 751 information about the type of inputs available.

### Example

The following example defines a required, editable metric entry for a metric named **MktShare**. The name of the entry, which acts as its ID in the online form, is **marketShare**, and its title is

**Estimated Market Share.** The field is typed as a number. After the user enters data in the form and saves a working copy, Accolade creates an additional element that stores the data.

```
<wd:group
  title="Market Info"
  isCollapsible="false">
  <wd:metric-entry
    title="Estimated Market Share"
    name="marketShare"
    MetricName="MktShare"
    isRequired="true"
    isEditable="true">
    <wd:type base="number"/>
  </wd:metric-entry>
</wd:group>
```

## local-entry

Creates a data entry row within a grid for data that is not connected to a metric or metadata within the database. Instead, the data is saved as part of the online form.

Parent element	<b>group</b>
Child elements	<b>type, initial-value</b>

## Format

```
<wd:local-entry
  title="Label for This Row"
  name="element_ID"
  isRequired="false"
  isEditable="true"
  inputControl="input-control-type"
  <wd:type base="datatype"/>
  <wd:initial-value>Literal string</wd:initial-value>
</wd:local-entry>
```

## Attributes

Attribute	Description
title	The source for the row title in the online form. Sopheon recommends you use the metric's display name as the title. Can contain <a href="#">substitution tokens</a> to display Accolade data. Defaults to a blank row title if not specified.

Attribute	Description
name	The source for the row title in the online form. Sopheon recommends you use the metric's display name as the title. Can contain <a href="#">substitution tokens</a> to display Accolade data. Defaults to a blank row title if not specified.
isRequired	Determines if an entry within this field in the online form is required before saving the form. Defaults to <b>false</b> if not specified.
isEditable	Determines if the field is editable within the online form. Defaults to <b>true</b> if not specified.
inputControl	Determines the type of field, such as a check box or drop-down list. The selection here depends on the data type, for example, a list metric lends itself well to a drop-down list selection field. See <a href="#">"XML Input Controls" on page 751</a> information about the type of inputs available.

**Example**

The following example shows a local entry containing a string of text with substitution tokens. When the online form is created from the template, the substitution tokens are replaced with actual names of the deliverable and the project.

```

<wd:group
  title="*{DeliverableName}*">
  <wd:local-entry
    title="Description of *{DeliverableName}*"
    name="PrimaryDescript1"
    isRequired="true"
    isEditable="true"
    inputControl="multi-line-text-box">
    <wd:type base="long-string"/>
    <wd:initial-value>Some information about *
{DeliverableName}* for *{ProjectName}* showing substitution.
    </wd:initial-value>
  </wd:local-entry>
</wd:group>
    
```

**type**

Identifies the **data type** of a **metric-entry** or local-entry elements.

Parent elements	<b>metric-entry, local-entry</b>
Child elements	enumeration, leftdigits, rightDigits

### Format

```
<wd:type base="boolean"/>
```

or

```
<wd:type base="enum">
  <wd:enumeration value="High"/>
  <wd:enumeration value="Medium"/>
  <wd:enumeration value="Low"/>
</wd:type>
```

### Attributes

Attribute	Description
base	<p>Identifies the data type for this entry. Can be one of the following:</p> <ul style="list-style-type: none"> <li>• <b>string</b> - Accepts a sequence of alpha-numeric characters. Use for string type metrics.</li> <li>• <b>long-string</b> - Accepts a long sequence of alpha-numeric characters. Use for long-string type metrics.</li> <li>• <b>number</b> - Accepts any digit and the decimal point. Use for number type metrics.</li> <li>• <b>date</b> - Accepts a date, such as 01/01/2014. Use with date type metrics.</li> <li>• <b>enum</b> - Accepts a single selection from a list of options. Use with list type metrics.</li> <li>• <b>boolean</b> - Accepts true or false. Applies to local-entry elements only.</li> <li>• <b>multi-enum</b> - Accepts multiple selections from a list of options. Applies to local-entry elements only.</li> </ul>

### Example

The following example defines an entry as a string type:

```
<wd:local-entry
  title="Activity Notes"
  name="ActivityNotes">
  <wd:type base="string"/>
</wd:local-entry>
```

## enumeration

Specifies the list items when a **local-entry** element's **type** is set to **enum** or **multi-enum**. This element applies to only **local-entry** elements.

Parent elements	<b>type</b>
Child elements	N/A

### Format

```
<wd:type base="enum">
  <wd:enumeration value="High"/>
  <wd:enumeration value="Medium"/>
  <wd:enumeration value="Low"/>
</wd:type>
```

### Attributes

Attribute	Description
value	Contains a list item as string enclosed in quotes.

### Example

```
<wd:local-entry
  title="Meteorological Risk"
  name="WeatherAtLaunch"
  input-control="multi-select-list">
  <wd:type base="multi-enum">
    <wd:enumeration value="snow"/>
    <wd:enumeration value="sleet"/>
    <wd:enumeration value="hail"/>
    <wd:enumeration value="heat"/>
    <wd:enumeration value="All the above"/>
  </wd:type>
```

## leftDigits

Specifies the maximum number of digits allowed to the left of the decimal point in a field that accepts a number. For example, if **leftDigits** is set to **4**, users can enter the number 12.3 or 1234.56, but not 12345.67. This element applies only to **metric-entry** and **local entry** parents that are set to use a **type** of number.

Parent elements	<b>type</b>
Child elements	N/A

## Format

```
<wd:type base="number"/>
  <wd:leftDigits value="6"/>
</wd:type>
```

## Attributes

Attribute	Description
value	Contains a positive, whole integer.

## Example

```
<wd:metric-entry
  title="Total Materials"
  name="TotMatrCost"
  metricName="TMC">
  <wd:type base="number">
    <wd:leftDigits value="5"/>
  </wd:type>
</wd:metric-entry>
```

## rightDigits

Specifies the maximum number of digits allowed to the right of the decimal point in a field that accepts a number. For example, if **rightDigits** is set to **3**, users can enter 12.1 or 0.123, but not 5.1234.

Parent elements	<b>type</b>
Child elements	N/A

## Format

```
<wd:type base="number">
  <wd:rightDigits value="2"/>
</wd:type>
```

## Attributes

Attribute	Description
value	Contains a positive, whole integer.



### Example

```
<wd:metric-entry
  title="Net Present Value"
  name="NPV"
  metricName="NPV">
  <wd:type base="number">
    <wd:leftDigits value="5"/>
    <wd:rightDigits value="2"/>
  </wd:type>
</wd:metric-entry>
```

### initial-value

Displays a value in a **local-entry** field before the document owner enters any data. When the document owner later modifies the entry, the new data replaces the initial displayed value.

Set the **local-entry** element to read-only to display an initial value without it be being editable.

Number of occurrences	Once for each containing entry.
Parent elements	<b>local-entry</b>
Child elements	<b>sub-value</b>

### Format

```
<wd:initial-value>Text string.</wd:initial-value>
```

**Note:** The text in an **initial-value** element is not enclosed in quotes as is the text in attributes and must be identical to one of the enumeration values.

### Attributes

None.

### Example

The following example shows an **initial-value** element for a **local-entry** that is a **type** of **string**:

```
<wd:local-entry
  name="comment 1"
  title="Stage Comment">
  <wd:type base="string"/>
  <wd:initial-value>Enter comments on progress since the last
gate meeting.
  </initial-value>
</wd:local-entry>
```

The following example shows an **initial-value** for a **local-entry** that is a **type** of **date**:

```

<wd:local-entry
  title="Market Launch">
  name="Mkt Launch"
  <wd:type base="date" />
  <wd:initial-value>07/04/2014
  </wd:initial-value>
</wd:local-entry>

```

The following example shows an **initial-value** for a **local-entry** that is a **type of enum**:

```

<wd:local-entry
  title="Tensile Quality">
  name="Tear_Strength"
  input-control="radio-button-group">
  <wd:type base="enum" />
  <wd:enumeration value="Easy" />
  <wd:enumeration value="Difficult" />
  <wd:enumeration value="Impossible" />
  <wd:initial-value>Easy</wd:initial-value>
</wd:local-entry>

```

## sub-value

Displays an initial value when a **local-entry** field is a **type of multi-enum**. It must contain as its value one of the enum items specified by an enumeration.

Parent elements	<b>initial-entry</b>
Child elements	None

## Format

```
<wd:sub-value>Text string</wd:sub-value>
```

## Attributes

None.

### Example

```
<wd:local-entry
  title="Most Active Markets"
  name="ActiveMkts"
  <wd:type base="multi-enum">
    <wd:enumeration value="Select two most active"/>
    <wd:enumeration value="USA"/>
    <wd:enumeration value="China"/>
    <wd:enumeration value="South America"/>
    <wd:enumeration value="Europe"/>
  </wd:type>
  <wd:initial-value>
  <wd:sub-value>Select two most active</wd:sub-value>
  </wd: initial-value>
</wd:local-entry>
```

### XML Input Controls

The **metric-entry** and **local-entry** elements contain an **inputControl** attribute that specifies the type of software control the entry field uses in the form.

The entry's software control must be appropriate to the type of data entered. in that field. For example, a date field needs to use the date **inputControl**. Each data type has a default input control, but where a different control is allowed you can override the default using the **inputControl** attribute. For example, to specify a multi-line text box for a string type entry, include the following code within the entry element.

```
inputControl="multi-line-text-box"
```

inputControl	Description	Default for Data Type
single-line-text-box	A text box with one line that accepts text. Suitable for entering short strings of text, such as names.	string
number-box	A text box with one line that accepts number. Suitable for entering decimal numbers.	number
multi-line-text-box	A text box with multiple lines. Suitable for entering longer strings, such as descriptions.	long string
check-box	A check box. Suitable for recording a yes/no or true/false value.	boolean

inputControl	Description	Default for Data Type
radio-button-group	A set of mutually-exclusive options buttons. Suitable for choosing a single value from a list.	
single-select-list	A list box that accepts one selection. Suitable for choosing a single value from a list.	
drop-down-list	A drop-down list of options that accepts one selection. Suitable for choosing a single value from a list.	enum
multi-select-list	A list box that accepts more than one selection. Suitable for choosing several values from a single list.	multi-enum
check-box-group	A set of check boxes. Suitable for choosing several values from a single list.	
date	A calendar. Suitable for selecting a date.	date

## Data Substitution Tokens in XML

Within in an online form's XML, include substitution tokens that are replaced with Accolade project information, such as the project name, from the project in which the form is being used. Substitution tokens are Accolade field codes, but formatted for use in XML code.

In the following example, the `*{DeliverableStageName}` token is replaced with the stage that the deliverable is in when the online form is accessed from a project.

```
<wd:local-entry
  title="Primary Goals in *{DeliverableStageName}*"
  name="Goals_Purpose"
  isRequired="false"
  ...
```

When the deliverable is opened, the substitution process finds all substitution tokens and replaces them with the appropriate data. If a substitution token is part of an **initialvalue**, the token will be overwritten when the document owner enters data into the entry. Modifying the initial value ends the substitution.

See "[Accolade Field Codes and Substitution Tokens](#)" on page 765 for a list of available substitution tokens.

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## Appendix E

# Queries and Query Codes

This appendix provides guidance around writing successful database queries, and a list of each of the query field codes available to pull Accolade project data into a query result.

## Writing Successful Database Queries

Keep the following general points in mind when writing queries in SQL to retrieve data from the Accolade database:

- In Accolade, queries are limited to the `SELECT` statement. A basic query has the following form:

```
SELECT ColumnName, ColumnName, ...
FROM ViewName
```

- Only one `FROM` statement is allowed in each query and it must be following by a [reporting view](#) name with the appropriate prefix. A single query can reference multiple reporting views.
- Queries can also contain a `WHERE` clause:

```
SELECT ColumnName, ColumnName, ...
FROM ViewName
WHERE ColumnName < ColumnName2, ...
```

- Queries in Accolade are not case sensitive, with the exception of the `LinkableName` query token.
- Use ANSI style SQL syntax in your query to ensure that it works correctly.
- Accolade queries are designed to prevent the corruption of data or the alteration of the database structure. To ensure database integrity, the following keywords can only be used within a `WHERE` clause:

- `DELETE`
- `DROP`
- `CREATE`
- `INSERT`
- `UPDATE`
- `GO`

- When writing queries for list metrics, to filter the items in the list, insert query field codes into a `WHERE` clause in the query. If you use a query that returns multiple columns in a list metric, the metric displays only the first column. For the list of query field codes, see ["Query Field Codes Reference" on page 756](#).
- Built-In SQL functions are not allowed when writing queries.
  - An Error occurs when attempting to write and execute queries with SQL functions.

## Substitution Tokens

Queries can contain tokens that insert data, such as a link to a project, into the results of the query. The following tokens are allowed in Accolade queries:

- **Query field codes** - A field code, much like an Accolade field code, that you can insert into a `WHERE` clause to restrain the list items in a query-based list metric. See "[Query Field Codes Overview](#)" on page 755.

The list metrics created can be either single select or multi-select and either individual or cascading, where the values displayed in the child metric in a cascading list depend on what was selected in the parent metric. The list metrics can be designated as filter metrics and used to filter projects, for example on the Resource Editor, Search, and other pages.

- **LinkableName** - Inserted instead of the ProjectName column displays the project's name as a link to the Accolade project.
- **\$USERID\$** - Inserted in a `WHERE` clause, restricts the information the query returns to only data to which the user viewing the report has access.

## Query Field Codes Overview

Add query field to `WHERE` clauses in database queries to constrain the list items in the list metric generated by the query. The list metrics created can be either single select or multi-select and either individual or cascading, where the values displayed in the child metric in a cascading list depend on what was selected in the parent metric. The list metrics can also be designated as filter metrics and used to filter projects, for example on the Resource Editor, Search, and other pages.

Using query codes when creating a query, you can retrieve the following information types:

- **Project metadata** - Returns current information about a project. For example, project name and description, gate dates, gate decisions, and so on.
- **Metrics** - Returns current values for metrics used throughout your system.
- **Extended Fields for Resource Pools** - Returns a comma delimited list of the selected security list item IDs for a resource pool.

## Field Code Format

Query fields have the following basic pattern: `{*source:name*}`, where source identifies the general type of data displayed, and name identifies the specific data. Query codes for metadata and extended fields use source **QMD**. Query Codes for metrics use source **QME**. Codes are not case sensitive.



Example

- `{*QMD:ProjectCreationDate*}` - Returns the date the project was created.
- `{*QME:NPV*}` - Returns the value for the metric whose system name is NPV.

See ["Query Field Codes Reference" on page 756](#) for a complete list of query codes available.

## Query Field Codes Reference

Use the following query field codes to retrieve project data from the database for display in a query-based list metric. You can copy and paste the codes from this topic directly into your queries. For information about creating queries, see ["Adding Database Queries" on page 373](#).

- ["QMD Codes \(metadata\)" on page 756](#)
- ["Extended Fields for Resource Pool Codes" on page 763](#)

### QMD Codes (metadata)

The following table contains the list of query codes that return project metadata, such as a project's current and next gate information. Codes are grouped into categories. For example, all the codes that return information about the next gate for a project start with ProjectNextGate.

Code	Description	Supported in Portfolio Optimizer
<code>{*QMD:AsOfDate*}</code>	When the query was last run.	Y
<b>Ideas</b>		
<code>{*QMD:DateReturnedToIdeaSubmitter*}</code>	The date on which this idea was returned to the idea submitter.	
<code>{*QMD:IdeaSubmitterID*}</code>	The idea submitter's user ID.	
<code>{*QMD:IdeaSubmitterName*}</code>	The idea submitter's name.	
<b>Process Model and Class</b>		
<code>{*QMD:ModelID*}</code>	The system ID of the project's model.	Y
<code>{*QMD:ModelName*}</code>	The name of the project's process model.	Y
<code>{*QMD:ProcessType*}</code>	The process type of the project's process model.	Y



Code	Description	Supported in Portfolio Optimizer
	For example, Gated.	
{*QMD:ProcessTypeID*}	The system ID of the process type of the project's model.	Y
{*QMD:ProjectClass*}	The project's class.	Y
<b>Access Group</b>		
{*QMD:ProjectAccessGroup*}	The name of the project's access group.	Y
{*QMD:ProjectAccessGroupID*}	The system ID of the project's access group	Y
<b>Security List</b>		
{*QMD:ProjectSecurityListID1*}	The system ID of the first security list.	Y
{*QMD:ProjectSecurityListID2*}	The system ID of the second security list.	Y
{*QMD:ProjectSecurityListID3*}	The system ID of the third security list.	Y
{*QMD:ProjectSecurityListID4*}	The system ID of the fourth security list.	Y
{*QMD:ProjectSecurityListID5*}	The system ID of the fifth security list.	Y
{*QMD:ProjectSecurityListSystemName1*}	The system name of the first security list.	Y
{*QMD:ProjectSecurityListSystemName2*}	The system name of the second security list.	Y
{*QMD:ProjectSecurityListSystemName3*}	The system name of the third security list.	Y
{*QMD:ProjectSecurityListSystemName4*}	The system name of the fourth security list.	Y
{*QMD:ProjectSecurityListSystemName5*}	The system name of the fifth security list.	Y

Code	Description	Supported in Portfolio Optimizer
<b>General Project Information</b>		
{*QMD:ProjectClosed*}	The project's closed statuses. Returns <b>1</b> if the project is closed.	Y
{*QMD:ProjectCreationDate*}	The date when the project was created in the system.	Y
{*QMD:ProjectDescription*}	The project's description.	Y
{*QMD:ProjectEndDate*}	The project's defined end date.	Y
{*QMD:ProjectID*}	The user-created ID of this document's project.	Y
{*QMD:ProjectIsGateFirst*}	Returns <b>1</b> if the process model used for the project begins with a gate instead of a stage.	Y
{*QMD:ProjectGateDate-(gate number)*}	The date of the gate meeting of a specific gate.	Y
{*QMD:ProjectName*}	The project's name.	Y
{*QMD:ProjectStartDate*}	The project's start date.	Y
{*QMD:SysProjectID*}	The project's system ID.	
<b>Currency</b>		
{*QMD:ProjectConversionFactor*}	The factor to convert the project currency to the corporate currency.	
{*QMD:ProjectCurrencyCode*}	The currency code of the currency used in the project. This may differ from your corporate currency.	
{*QMD:ProjectCurrencyName*}	The name of the currency used in the project.	

Code	Description	Supported in Portfolio Optimizer
<b>Current Phase or Stage</b>		
{*QMD:ProjectCurrentPhase*}	The phase the project is currently in.	Y
{*QMD:ProjectCurrentStageDescription*}	The current stage's description.	
{*QMD:ProjectCurrentStageName*}	The current stage's name.	Y
<b>Previous Gate Information</b>		
{*QMD:ProjectPreviousGateConditions*}	The conditions if the previous gate decision was Conditional Go.	Y
{*QMD:ProjectPreviousGateDate*}	The gate date of the previous gate.	Y
{*QMD:ProjectPreviousGateDescription*}	The description of the previous gate.	
{*QMD:ProjectPreviousGateLocation*}	The location of the previous gate meeting.	
{*QMD:ProjectPreviousGateName*}	The name of the previous gate.	Y
{*QMD:ProjectPreviousGateNotes*}	The gate notes of the previous gate.	
<b>Most Recent Gate and Status Information</b>		
{*QMD:ProjectMostRecentGateDecisionCode*}	The gate decision code of the project's previous gate.	Y
{*QMD:ProjectMostRecentGateDecisionName*}	The name of the project's previous gate.	Y
{*QMD:ProjectMostRecentStatus*}	The text of the most recent project status message.	
{*QMD:ProjectMostRecentStatusAuthor*}	The user name of the author of the project's most recent status mes-	

Code	Description	Supported in Portfolio Optimizer
	sage.	
{*QMD:ProjectMostRecentStatusDate*}	The date of the project's most recent status message.	
<b>Next Gate or Stage</b>		
{*QMD:ProjectNextGateDate*}	The date of the next project gate	Y
{*QMD:ProjectNextGateDescription*}	The description of the next project gate	
{*QMD:ProjectNextGateLocation*}	The location of the next project gate meeting.	
{*QMD:ProjectNextGateName*}	The name of the next project gate.	Y
{*QMD:ProjectNextGateOwnerEmail*}	The email address of the gate owner of the next project gate.	
{*QMD:ProjectNextGateOwnerID*}	The system ID of the gate owner of the next project gate.	
{*QMD:ProjectNextGateOwnerName*}	The name of the gate owner of the next project gate.	
{*QMD:ProjectNextGateOwnerVMAddress*}	The chat address of the gate owner of the next project gate.	
{*QMD:ProjectNextStageName*}	The name of the next project stage.	
<b>Gate After the Next Gate</b>		
{*QMD:ProjectFollowingGateDate*}	The date of the gate after the next gate in the model.	Y
{*QMD:ProjectFollowingGateDescription*}	The description of the gate after the next gate.	

Code	Description	Supported in Portfolio Optimizer
{*QMD:ProjectFollowingGateLocation*}	The location of the gate meeting after the next gate.	
{*QMD:ProjectFollowingGateName*}	The name of the gate after the next gate.	Y
<b>Next Stage</b>		
{*QMD:ProjectNextStageDescription*}	The description of the next project stage.	
{*QMD:ProjectNextStageName*}	The name of the next project stage.	Y
<b>Project Manager (Team Leader)</b>		
{*QMD:ProjectTeamLeaderEmail*}	The email address of the project's manager.	
{*QMD:ProjectTeamLeaderID*}	The ID of the project's manager.	Y
{*QMD:ProjectTeamLeaderName*}	The name of the project's manager.	Y
{*QMD:ProjectTeamLeaderVMAddress*}	The chat address of the project's manager.	
<b>Project Status</b>		
{*QMD:ProjectWarningStatus*}	Returns <b>1</b> through <b>8</b> : <ul style="list-style-type: none"> <li>• 1 - One or more deliverables in the current stage are marked in trouble.</li> <li>• 2 - Next gate is within warning period and some deliverables are incomplete.</li> <li>• 3 - Some deliverables in current stage are incomplete.</li> <li>• 4 - Project is ready</li> </ul>	

Code	Description	Supported in Portfolio Optimizer
	<p>for next gate.</p> <ul style="list-style-type: none"> <li>• 5 - One or more deliverables in the current stage are marked in trouble and there are unmet conditions in the previous gate.</li> <li>• 6 - Next gate is within warning period, some deliverables are incomplete, and there are unmet conditions in the previous gate.</li> <li>• 7 - Some deliverables are incomplete, and there are unmet conditions in the previous gate.</li> <li>• 8 - Project is ready for next gate but there are unmet conditions in the previous gate.</li> </ul>	
{*QMD:ProjectInTrouble*}	Returns 1 if the project is marked as In Trouble.	Y
<b>Project Resources</b>		
{*QMD:RequestorIsProjectOwner*}	Returns 1 if the user requesting a resource is the project manager of the project.	Y
<b>Exclusions</b>		
{*QMD:ProjectExcludeFromLineup*}	Returns 1 if the project is prevented from appearing on the Gate Lineup	

Code	Description	Supported in Portfolio Optimizer
	page.	
{*QMD:ProjectExcludeFromReports*}	Returns <b>1</b> if the project's data is prevented from appearing in reports.	

### Extended Fields for Resource Pool Codes

You can create a query-based, list-type field whose query contains a field code like the QMD query field codes for list metrics. The code's pattern is **{\*QMD:(metadata name)\*}**. The code returns a comma delimited list of the selected security list item IDs for the pool.

Code	Description
{*QMD:PoolSecurityListID1*}	Code for security list 1.
{*QMD:PoolSecurityListID2*}	Code for security list 2.
{*QMD:PoolSecurityListID3*}	Code for security list 3.
{*QMD:PoolSecurityListID4*}	Code for security list 4.
{*QMD:PoolSecurityListID5*}	Code for security list 5.
{*QMD:PoolSecurityListSystemName1*}	System name for security list 1.
{*QMD:PoolSecurityListSystemName2*}	System name for security list 2.
{*QMD:PoolSecurityListSystemName3*}	System name for security list 3.
{*QMD:PoolSecurityListSystemName4*}	System name for security list 4.

Code	Description
{*QMD:PoolSecurityListSystemName5*}	System name for security list 5.



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## Appendix F

# Accolade Field Codes and Substitution Tokens

Use Accolade field codes and substitution tokens to pull data from Accolade into a document upon download or an online form upon open. For example, enter a code that represents the date of the next gate in project. When the document or online form is opened, the code is replaced with the date for the next gate as it is entered in the project, without having to manually update the information.

You can use field codes in documents, spreadsheets, and presentations (and in online forms, however, the format is different). Most Accolade fields also work in project-level reports.

The tables in the sections below contain the complete codes for the MD, CONFIG, IMAGE, REFTABLE, CHART, QUICK GRID, QUICK GRID ELEMENT, REPORT, POD, and FLAG sources, and their online form equivalents where applicable. Metrics use the metric system name as the code name and they can be unique to each company, so a list of complete codes is not provided for the METRIC source.

-  You can copy and paste codes from this topic directly into your documents or forms. To find the code you need, first identify the source of the data. For example, to add a piece of data from a project, you need metadata. From there, determine what type of document you are creating; deliverable, activity, or gate document. Narrowing down the source and subcategory within the source can help find the name of the item in the information below.

## Metadata (MD)

Use the MD source to display metadata, additional data about the project or document that the code is in, such as the author's name. The following tables contain data relating to projects, deliverables, activities, and gates. Some codes are restricted as to the document type. Additionally, not all codes can be used in metric calculations. Use the code's equivalent function formula in calculations. See "[Calculated Metric Expressions Reference](#)" on page 136 for a list of functions.

A code used in the wrong type of document does display any information when the document is refreshed.

### Project Data Codes

Project codes display information about the current state of the project at the time the field is refreshed. These fields can be used in any Accolade document, project-level report, or online form.

For example, if the project is currently in Stage 2, the "next gate name" code shows the name of Gate 2, whether the code is in a deliverable in Stage 1 or an Activity in Stage 5. That is, project metadata is not related to the stage or gate the document is stored in, but to the stage that the project is currently in. Project metadata codes works in all project documents (including related documents). For example, if the project is currently in Stage 2, the "next gate name" code shows the name of Gate 2, whether the code is in a deliverable in Stage 1 or an Activity in Stage 5. That is, project metadata is not related to the stage or gate the document is stored in, but to the stage that the project is currently in. Project metadata codes works in all project documents (including related documents)

File-Based Code	Online Form Code	Description
{*MD:AsOfDate*}	*{AsOfDate}*	When the data was last refreshed with the current data from the server.**
{*MD:ProjectName*}	*{ProjectName}*	The name of this document's project.**
{*MD:ProjectID*}	*{ProjectID}*	The user-created ID of this document's pro-

File-Based Code	Online Form Code	Description
		ject.**
{*MD:SysProjectID*}	*{SysProjectID}*	The Accolade system ID number of this document's project.**
{*MD:ProjectDescription*}	*{ProjectDescription}*	The description of the project from the model.**
{*MD:ProjectClass*}	*{ProjectClass}*	The name of this project's class.**
{*MD:ProjectCreatedByID*}	*{ProjectCreatedByID}*	The ID of the user that created the project.**
{*MD:ProjectCreatedByName*}	*{ProjectCreatedByName}*	The name of the user that created the project.**
{*MD:ProjectStartDate*}	*{ProjectStartDate}*	The date when the project started.**
{*MD:ProjectEndDate*}	*{ProjectEndDate}*	The date when the project ended.**
{*MD:ProjectCreationDate*}	*{ProjectCreationDate}*	The date when this project was created.**
{*MD:ProjectTeamLeaderName*}	*{ProjectTeamLeaderName}*	The name of this project's Project Manager.**

File-Based Code	Online Form Code	Description
{*MD:ProjectTeamLeaderEmail*}	*{ProjectTeamLeaderEmail}*	The email address of this project's Project Manager.**
{*MD:ProjectTeamLeaderVMAddress*}	*{ProjectTeamLeaderVMAddress}*	The chat address of this project's Project Manager.
{*MD:IdeaSubmitterName*}	*{IdeaSubmitterName}*	The name of the person who submitted the idea.
{*MD:ProjectAccessGroup*}	*{ProjectAccessGroup}*	The name of this project's access group.**
{*MD:ProjectCurrentPhase*}	*{ProjectCurrentPhase}*	The system ID number of the current stage/gate pair in the project. The project current phase is set to <b>0</b> if the project ends in a gate, and the gate's decision is set to <b>Go</b> .**
{*MD:ProjectCurrentStageName*}	*{ProjectCurrentStageName}*	The name of the current project stage.**
{*MD:ProjectCurrentStageDescription*}	*{ProjectCurrentStageDescription}*	The description of the

File-Based Code	Online Form Code	Description
		current project stage.
{*MD:ProjectNextStageName*}	*{ProjectNextStageName}*	The name of the next project stage.
{*MD:ProjectNextStageDescription*}	*{ProjectNextStageDescription}*	The description of the next project stage.
{*MD:ProjectNextGateName*}	*{ProjectNextGateName}*	The name of the next gate in the project.**
{*MD:ProjectNextGateDescription*}	*{ProjectNextGateDescription}*	The description of the next gate in the project.
{*MD:ProjectNextGateDate*}	*{ProjectNextGateDate}*	When the next gate meeting of this project will occur.**
{*MD:ProjectNextGateLocation*}	*{ProjectNextGateLocation}*	The location of the next gate meeting.
{*MD:ProjectNextGateOwnerName*}	*{ProjectNextGateOwnerName}*	The name of the gate owner of the project's next gate.**
{*MD:ProjectNextGateOwnerID*}	*{ProjectNextGateOwnerID}*	The system ID of the gate owner of the project's next gate.
{*MD:ProjectNextGateOwnerEmail*}	*{ProjectNextGateOwnerEmail}*	The email

File-Based Code	Online Form Code	Description
		address of the gate owner of the project's next gate.
{*MD:ProjectNextGateOwnerVMAddress*}	*{ProjectNextGateOwnerVMAddress}*	The chat address of the gate owner of the project's next gate.
{*MD:ProjectPreviousGateName*}	*{ProjectPreviousGateName}*	The name of the gate before the current stage.
{*MD:ProjectPreviousGateDescription*}	*{ProjectPreviousGateDescription}*	The description of the gate before the current stage.
{*MD:ProjectPreviousGateDate*}	*{ProjectPreviousGateDate}*	The date of the gate meeting before the current stage.**
{*MD:ProjectPreviousGateLocation*}	*{ProjectPreviousGateLocation}*	The location of the previous gate meeting.
{*MD:ProjectPreviousGateNotes*}	*{ProjectPreviousGateNotes}*	Notes taken at the previous gate meeting.
{*MD:ProjectPreviousGateConditions*}	*{ProjectPreviousGateConditions}*	The description of conditions, if any, entered

File-Based Code	Online Form Code	Description
		in the last approved gate.
{*MD:ProjectFollowingGateName*}	*{ProjectFollowingGateName}*	The name of the gate following the next gate.
{*MD:ProjectFollowingGateDescription*}	*{ProjectFollowingGateDescription}*	The description of the gate following the next gate.
{*MD:ProjectFollowingGateDate*}	*{ProjectFollowingGateDate}*	The date of the gate meeting after the next gate.
{*MD:ProjectFollowingGateLocation*}	*{ProjectFollowingGateLocation}*	The location of the gate meeting after the next gate.
{*MD:ProjectGateDate-<gate number>*}	*{ProjectGateDate-<gate number>*}	The date of the gate meeting of a specific gate. For use in an MS Excel-based template using the SGM_Metadata worksheet.**
{*MD:ProjectMostRecentStatus*}	*{ProjectMostRecentStatus}*	The text of the project's most recent status report.**

File-Based Code	Online Form Code	Description
{*MD:ProjectMostRecentStatusAuthor*}	{*ProjectMostRecentStatusAuthor*}	The name of the person who created the project's most recent status report.**
{*MD:ProjectMostRecentStatusDate*}	{*ProjectMostRecentStatusDate*}	When the project's most recent status report was created.**
{*MD:ModelName*}	*{ModelName}*	The name of the model this project is using.* **
{*MD:ProcessType*}	*{ProcessType}*	The type of model this project is using, for example, Gated.*
{*MD:ProjectCurrencyCode*}	*{ProjectCurrencyCode}*	The currency code of the project currency.*
{*MD:ProjectCurrencyName*}	*{ProjectCurrencyName}*	The name of the project currency.*
{*MD:ProjectConversionFactor*}	*{ProjectConversionFactor}*	The multiplier used to convert the project currency to the corporate currency.*
{*MD:ProjectClosed*}	*{ProjectClosed}*	The project's



File-Based Code	Online Form Code	Description
		closure status.**

\* Available to idea forms.

\*\* Invalid metadata code in calculated metrics. Use the equivalent formula function in calculations instead.

## Deliverable Data Codes

Deliverable codes display information about the deliverable or about the parent deliverable if they are in an activity document. Use deliverable codes only in deliverables and activity documents.

File-Based Code	Online Form Code	Description
{*MD:DeliverableName*}	*{DeliverableName}*	The deliverable's name.*
{*MD:DeliverableID*}	*{DeliverableID}*	The deliverable's system ID number.
{*MD:DeliverableDescription*}	*{DeliverableDescription}*	The deliverable's description.*
{*MD:DeliverableOwnerName*}	*{DeliverableOwnerName}*	The name of the deliverable's owner.
{*MD:DeliverableOwnerEmail*}	*{DeliverableOwnerEmail}*	The email address of the deliverable's owner.
{*MD:DeliverableOwnerVMAddress*}	*{DeliverableOwnerVMAddress}*	The chat address of the deliverable's owner.
{*MD:DeliverableStageName*}	*{DeliverableStageName}*	The name of the deliv-

File-Based Code	Online Form Code	Description
		erable's stage.*
{*MD:IsStageLocked*}	*{IsStageLocked}*	Returns a <b>1</b> if the deliverable's stage is locked, <b>0</b> if unlocked.
{*MD:DeliverableStart*}	*{DeliverableStart}*	The deliverable's start date.
{*MD:DeliverableDeadline*}	*{DeliverableDeadline}*	The date entered in Accolade by which this deliverable should be completed.
{*MD:DeliverablePlannedFinishDate*}	*{DeliverablePlannedFinishDate}*	The date entered in MS Project on which this deliverable should be completed.
{*MD:DeliverableStatusID*}	*{DeliverableStatusID}*	The current status, such as In Process, of this deliverable.
{*MD:DeliverableFunctionalArea*}	*{DeliverableFunctionalArea}*	The deliverable's functional area.
{*MD:DeliverableFunctionalAreaSysName*}	*{DeliverableFunctionalAreaSysName}*	The system name of the deliverable's

File-Based Code	Online Form Code	Description
		function.
{*MD:DeliverableNextGateName*}	*{DeliverableNextGateName}*	The name of the next gate, relative to the stage that contains the deliverable.
{*MD:DeliverableFollowingGateName*}	*{DeliverableFollowingGateName}*	The name of the gate following the next gate, relative to the stage that contains the deliverable.
{*MD:DeliverableFunctionalArea*}	*{DeliverableFunctionalArea}*	<i>(Obsolete)</i> This code is included only for backwards compatibility and will be removed in a future release.

\* Available to idea forms.

## Activity Data Codes

Activity codes display information about the activity they are in. Use activity codes only in activity documents.

File-Based Code	Online Form Code	Description
{*MD:ActivityName*}	*{ActivityName}*	The activity's name.
{*MD:ActivityID*}	*{ActivityID}*	The activity's system ID

File-Based Code	Online Form Code	Description
		number.
{*MD:ActivityDescription*}	*{ActivityDescription}*	The activity's description.
{*MD:ActivityOwnerName*}	*{ActivityOwnerName}*	The name of this activity's owner.
{*MD:ActivityOwnerEmail*}	*{ActivityOwnerEmail}*	The email address of the activity's owner.
{*MD:ActivityOwnerVMAddress*}	*{ActivityOwnerVMAddress}*	The chat address of the activity's owner.
{*MD:ActivityStageName*}	*{ActivityStageName}*	The name of the activity's stage.
{*MD:IsStageLocked*}	*{IsStageLocked}*	Returns a <b>1</b> if the activity's stage is locked, 0 if unlocked.
{*MD:ActivityStart*}	*{ActivityStartID}*	The activity's start date.
{*MD:ActivityDeadline*}	*{ActivityDeadline}*	The date, entered in Accolade, for when this activity should be completed.
{*MD:ActivityPlannedFinishDate*}	*{ActivityPlannedFinishDate}*	The date entered in MS Project on which this activity should be completed.

File-Based Code	Online Form Code	Description
{*MD:ActivityStatusID*}	*{ActivityStatus}*	The current status, such as In Process, of this activity.
{*MD:ActivityFunctionalArea*}	*{ActivityFunctionalArea}*	The activity's functional area.
{*MD:ActivityFunctionalAreaSysName*}	*{ActivityFunctionalAreaSysName}*	The system name of the activity's functional area.

## Gate Data Codes

Gate codes display information about the gate that their document is stored in. Use gate codes only in gate documents.

Code	Description
{*MD:GateName*}	The name of the gate that document is stored in.
{*MD:GateDescription*}	The gate's description.
{*MD:GateDocumentName*}	The gate document's name.
{*MD:GateDocumentID*}	This gate document's system ID number.
{*MD:GateDocumentDescription*}	This gate document's description.
{*MD:GateOwnerName*}	The name of the gate owner of this gate.
{*MD:GateOwnerID*}	The user ID of this gate's owner.
{*MD:GateOwnerEmail*}	The email address of this gate's owner.
{*MD:GateOwnerVMAddress*}	The chat address of this gate's owner.

## Extended Project Data Codes

Extended project data codes display and update information that is entered in up to ten fields to enter extended strings that are added to a project at the process model level. These fields can be used in any Accolade document; however, ensure that the document format accepts the amount of data added to the field. See "[Capturing Large Data Strings in Accolade](#)" on page 161.

Code	Description
{*MD:ExtendedProjectData<field number>*}	The data entered in the specified <b>Extended Project Data</b> field in the project. For example, {*MD:ExtendedProjectData1*}, {*MD:ExtendedProjectData2*}, etc.

## Idea Form Codes

The following Idea form codes are substitution tokens specific to idea online forms and display information about the idea model. Note that other options are available to idea forms, as indicated by <sup>1</sup> in the previous tables.

Idea Online Form Code
*{DeliverableRoutingType}*
*{PMDeliverableID}*
*{PMDeliverableName}*
*{PMDeliverableDescription}*
*{ProcessModelID}*
*{ProcessName}*
*{ProcessOwnerEmail}*
*{ProcessOwnerName}*
*{ProcessOwnerVMAddress}*
*{ProcessDescription}*
*{PhaseName}*

## CONFIG

Accolade provides the option to change the names for certain terms used throughout the system. For example, stages, gates, and deliverables can be renamed to fit your company's nomenclature. Use the CONFIG codes below to display custom names that your company uses instead of Accolade terms. The Administrator or Process Designer must have already entered the preferred name on the **Parameters** tab of the **Configuration** page for these fields to work correctly. This source also includes two codes for currencies.

Code	Description
{*CONFIG:CompanyName*}	The name of your company.

Code	Description
{*CONFIG:Accolade*}	The custom name for "Accolade."
{*CONFIG:CorporateCurrencyCode*}	The code for your corporate currency. This field code is not used to display a custom name.
{*CONFIG:CorporateCurrencyName*}	The name of your corporate currency. This field code is not used to display a custom name.
{*CONFIG:Stage*}	The custom name for "stage."
{*CONFIG:Stages*}	The custom name for "stages."
{*CONFIG:Gate*}	The custom name for "gate."
{*CONFIG:Gates*}	The custom name for "gates."
{*CONFIG:GateDocument*}	The custom name for "gate document."
{*CONFIG:GateDocuments*}	The custom name for "gate documents."
{*CONFIG:GateOwner*}	The custom name for "gate owner."
{*CONFIG:Deliverable*}	The custom name for "deliverable."
{*CONFIG:Deliverables*}	The custom name for "deliverables."
{*CONFIG:Activity*}	The custom name for "activity."
{*CONFIG:Activities*}	The custom name for "activities."

## IMAGE

Use to display Accolade project images. When a template is opened in a project, selected images from that project display in the document. Your implementation of Accolade may include other, custom image codes in addition to the standard codes listed here.

Unlike other codes, IMAGE codes are not pasted into the document text but into the **Web** tab of the Format Picture dialog box where the image is inserted.

Code	Description
{*IMAGE:ProjectThumbnail*}	The image selected as the Project Thumbnail.
{*IMAGE:ProjectMain*}	The image selected as the Project Main.
{*IMAGE:ProjectProcessGraphic*}	The model graphic shown on <b>Home</b> and other project pages. Includes text and stage and gate icons.

## REFTABLE

Use the REFTABLE code to display the value from a single reference table cell. It has an extended pattern that is required to specify the table, row, and column of the cell.

```
{*REFTABLE:<TableSystemName> #RowID=<row ID>
#ColumnID=<ColumnSystemName>*
```

The value for the Row ID is the value in the first column of the row. In a currency table, it would be the currency code. The value of the Column ID is the column's system name. The only spaces in this pattern occur just before each # character. The order of the #RowID and #ColumnID options in the pattern does not matter. Like the other codes, the REFTABLE code is not case sensitive.



Example

{\*REFTABLE:sgm\_currency #RowID=USD #ColumnID=CurrencyName\*} displays the value in the "USD" row of the "CurrencyName" column of the "Currency" table.

## CHART

Use the CHART field code to display a chart created in Accolade. The CHART field code is only [valid in presentations](#). The source is always "Chart", and the name identifies which chart to display by the chart system name.

```
{*CHART:<ChartSystemName>*
```



Example

{\*Chart:<ChartSystemName>} is the basic naming pattern. For example, {\*CHART:TCost\*} displays the chart with a system name of "TCost."

## QUICK GRID

Use the QUICK GRID field code to display a quick grid created in Accolade. The QUICK GRID field code is only [valid in presentations](#) and has an extended pattern required to specify the grid contained in the quick grid. Only one grid can be specified per quick grid field code.

```
{*QUICKGRID:<QuickGridSystemName> #Grid=<GridSystemName>*
```



Example

{\*QuickGrid:<QuickGridSystemName> #Grid=<GridSystemName>} is the basic naming pattern. For example, {\*QuickGrid:RegionalProjections #Grid=QuarterOne\*} displays the individual grid "QuarterOne" that is a component of the quick grid "RegionalProjections."



## QUICK GRID ELEMENT

Use the QUICK GRID ELEMENT field code to display a specific cell from a quick grid created in Accolade. The QUICK GRID ELEMENT field code is only [valid in presentations](#) and has an extended pattern required to specify the specific cell and grid contained in the quick grid. Only one cell and grid can be specified per quick grid element field code.

**Note:** Matrix quick grids are not supported with the Quick Grid Element field code.

```
{*QUICKGRIDELEMENT:<QuickGridSystemName> #Grid=<GridSystemName>
#Element=<ElementSystemName>*
```



Example

```
{*QuickGridElement:<QuickGridSystemName> #Grid=<GridSystemName>
#Element:<ElementSystemName>*
```

is the basic naming pattern. For example, `{*QuickGridElement:RegionalProjections #Grid=QuarterOne #Element=COGS*}` displays COGS cell data from the individual grid "QuarterOne" that is a component of the quick grid "RegionalProjections."

## REPORT

Use the REPORT field code to display an [online report created in Accolade](#). The field code does not support HTML reports or reports created in the Accolade Office Extensions add-in. The REPORT field code is only [valid in presentations](#). The source is always "Report", and the name identifies which report to display by the report system name.

```
{*REPORT:<ReportSystemName>*
```



Example

```
{*Report:<ReportSystemName>*
```

is the basic naming pattern. For example, `{*Report:FinancialStatus*}` displays the report with a system name of "FinancialStatus."

## POD

The POD code pulls project information contained on custom project pages. The code requires an extended pattern to identify the layout containing the pod, and then specify which pod to include. The POD code is only [valid in presentations](#).

```
{*POD:<LayoutSystemName> #PodSystemName=<PodSystemName>*
```

**Note:** This field code goes in the shape's alt text.



Example

{\*Pod:<LayoutSystemName> #PodSystemName=<PodSystemName>} is the basic naming pattern. For example, {\*Pod:ProjectHomeLayout #PodSystemName=DataFormForHome\*} displays the pod with a system name of "DataFormForHome" within the layout "ProjectHomeLayout."

## METRIC

See [Metric Field Codes with Options](#) for information about adding metric codes and long string metrics to documents.

## FLAG

Use the FLAG field code to denote a special action to be performed.

**Note:** This field code goes in the shape's alt text.



Example

{\*FLAG:RepeatForSelectedProjects\*} - When placed on a slide, repeats the slide for all selected projects.

{\*FLAG:RepeatForMatrixRows\*} - When placed on a slide, renders a new slide for each row of a matrix.

## PORTFOLIO SUMMARY

Use the PortfolioSummary field code to indicate that a shape is to be used to summarize a portfolio presentation. Cannot be used with the "repeat" FLAG field code.

**Note:** This field code goes in the shape's alt text.



Example

{\*PortfolioSummary:BulletedList #Fields=MD|[MetadataName],METRIC|[MetricSystemName]... \*}

{\*  
PortfolioSummary:SmartArt  
#SmartArtLayouttype=VerticalPictureAccentList #ImageType=ProjectThumbnail\*}

### Portfolio Summary Field Code Breakdown:

PortfolioSummary:[SummaryType]  
*Always Required*

Notes: BulletedList does not support project images.

Possible values are:

- BulletedList
- SmartArt

SmartArtLayoutType=[LayoutTypeName]  
*Required for "PortfolioSummary:SmartArt"*

Notes: The smart art will replace the shape the field code was in. If a user tries to specify a SmartArt Type that is unsupported, the refresh will use VerticalPictureAccentList instead.

Full list of supported Smart Art types:

- AccentProcess
- AccentedPicture
- AlternatingFlow
- AlternatingHexagons
- AlternatingPictureBlocks
- AlternatingPictureCircles
- ArrowRibbon
- AscendingPictureAccentProcess
- Balance
- BasicBendingProcess
- BasicBlockList
- BasicChevronProcess
- BasicCycle
- BasicMatrix
- BasicPie
- BasicProcess
- BasicPyramid
- BasicTarget
- BasicTimeline
- BasicVenn
- BendingPictureAccentList
- BendingPictureBlocks
- BendingPictureCaption
- BendingPictureCaptionList
- BendingPictureSemiTransparentText
- BlockCycle
- BubblePictureList
- CaptionedPictures

- ChevronList
- CircleAccentTimeline
- CircleArrowProcess
- CirclePictureHierarchy
- CircularBendingProcess
- CircularPictureCallout
- ClosedChevronProcess
- ContinuousArrowProcess
- ContinuousBlockProcess
- ContinuousCycle
- ContinuousPictureList
- ConvergingArrows
- CounterbalanceArrows
- CycleMatrix
- DescendingBlockList
- DescendingProcess
- DetailedProcess
- DivergingArrows
- Equation
- FramedTextPicture
- Funnel
- Gear
- GridMatrix
- GroupedList
- HalfCircleOrganizationChart
- HexagonCluster
- Hierarchy
- HierarchyList
- HorizontalBulletList
- HorizontalHierarchy
- HorizontalLabeledHierarchy
- HorizontalMultiLevelHierarchy
- HorizontalOrganizationChart
- HorizontalPictureList
- IncreasingArrowsProcess
- IncreasingCircleProcess
- InvertedPyramid

- LabeledHierarchy
- LinearVenn
- LinedList
- MultidirectionalCycle
- NameandTitleOrganizationChart
- NestedTarget
- NondirectionalCycle
- OpposingArrows
- OpposingIdeas
- OrganizationChart
- PhasedProcess
- PictureAccentBlocks
- PictureAccentList
- PictureAccentProcess
- PictureCaptionList
- PictureGrid
- PictureLineup
- PictureStrips
- PieProcess
- PlusandMinus
- ProcessArrows
- ProcessList
- PyramidList
- RadialList
- RadialVenn
- RandomToResultProcess
- RepeatingBendingProcess
- ReverseList
- SegmentedCycle
- SegmentedProcess
- SegmentedPyramid
- SnapshotPictureList
- SpiralPicture
- SquareAccentList
- StackedList
- StackedVenn
- StaggeredProcess

- StepDownProcess
- StepUpProcess
- SubStepProcess
- TableHierarchy
- TargetList
- TextCycle
- TitlePictureLineup
- TitledPictureAccentList
- TitledPictureBlocks
- TrapezoidList
- UpwardArrow
- VerticalAccentList
- VerticalArrowList
- VerticalBendingProcess
- VerticalBlockList
- VerticalBoxList
- VerticalBulletList
- VerticalChevronList
- VerticalCircleList
- VerticalCurvedList
- VerticalEquation
- VerticalPictureAccentList
- VerticalPictureList
- VerticalProcess

#Fields=[List of fields to display]

*Optional*

Notes: Multiple metadata fields and metric fields can be added by appending them to the ones before with a ",". Any metric is allowed to be in the Fields section. Please note the vertical bar character "|" between "MD" and "MetadataName".

Supported Metadata

- ProjectId
- ProjectName
- Description
- TeamLeader
- CurrentStage

- NextGate
- LastGate

#ImageType=[ProjectImageType]  
*Optional*

Notes: Project picture (thumbnail / main as defined in domain table).

## MATRIX METRIC

Can only be used in PowerPoint. See [Adding Accolade Objects to PowerPoint](#) for information about adding matrix metric codes to PowerPoints.

## RICH TEXT MATRIX METRIC

Can only be used in PowerPoint. See [Adding Accolade Objects to PowerPoint](#) for information about adding rich text matrix metric codes to PowerPoints.

## RICH TEXT METRIC

Can only be used in PowerPoint. See [Adding Accolade Objects to PowerPoint](#) for information about rich text metric codes to PowerPoints.

## INFO

Used in office documents to show additional non-project information.

Code	Description
{*INFO:RefreshTimestamp*}	Only available to Excel documents.  Token is replaced with the time that a Smart Refresh occurred. Useful for tracking how fresh the data contained within a Smart Excel Document is.

---

**Learn More:**

- [Field Codes Overview](#)
- ["Accolade Field Code Placeholders" on page 788](#)
- ["Metric Field Codes with Options" on page 788](#)

## Accolade Field Code Placeholders

When you download a document from Accolade and open it in a Microsoft application, the Accolade data replaces the field code in the document, making it difficult to tell what is represented by a field code, especially if you are a Process Designer or Administrator maintaining templates.

Each field code entered into a document is marked in the document with a placeholder so you can determine the location of the code, even when it displays Accolade data. All Accolade field code placeholders have names that begin with **SGM\_** and are saved as the following:

Microsoft Application	Placeholder
Word	Saved as bookmarks.
Excel	Saved as cell ranges.
PowerPoint	Saved as alternative text on the Web tab of the Format (object) dialog box for the relevant shape.

Use the tools within each Microsoft application to locate the placeholder.


### Learn More:

[Accolade Field Codes Overview](#)

[Accolade Field Codes Reference](#)

["Metric Field Codes with Options" on page 788](#)

## Metric Field Codes with Options

 To create a report showing the system names of all current metrics, use Accolade Office Extensions or Accolade Online Reporting to create a report that includes the Metric Display Name and Metric System Name columns from the Metric Definitions subject.

Use metric field codes to do the following:

- Display a metric's value.
- Display other data related to the metric.
- Update a metric value (only in the case of a Long String type metric in a Word document that is not a related document).

The basic pattern of a metric field code is the same as for other codes: **{\*source:name\*}**. For metric codes, the source is always "Metric", and the name is the system name of the metric.



For example, `{*METRIC:TCost*}` displays the value of the metric whose system name is "TCost".

**Note:** Because a metric code uses the metric's system name, if a metric's system name changes, you must update any templates or reports that contain a code for that metric.

---

**Important!** This does not apply to MetricRichText tokens.

---

## Option Patterns

Metric codes have optional additions to the basic pattern. Options can:

- Make the code display something other than the metric value.
- Change how the value is displayed.
- Enable the code to update a metric value in addition to displaying it. This capability is limited to codes for Long String type metrics in Word documents that are not related documents.

If options are added, they are listed after the code's name. The pattern for a metric code with options is: `{*METRIC:name option*}`. The name and options, if any, are separated by a space.



Example

`{*METRIC:NPV #DisplayName*}` would show the NPV metric's display name rather than the metric value. And `{*METRIC:NPV #ProjectCurrency #Format2*}` would display the value in the project currency using that currency's second format.

There are two types of options, primary and secondary:

- **Primary Option** - Identifies the data that replaces the value, so a code can contain only one primary option.
- **Secondary Option** - Specifies how the field code behaves, so a code can contain one or more secondary options either in addition to or without a primary.

The options in the table below are intended for use in ordinary, non-updating codes while the options in the second table are for codes that update Long String metrics in Word. ***Options in one table should not be combined in the same code with options from the other table.***

## Metric Code Options

Some options in the following table can be used with all types of metrics, while others should be used only in certain types, as shown in the table.

Option	Option Type	Description
<b>All Metric Types</b>		
#DisplayName	Primary	Displays the metric's display name.
#Description	Primary	Displays the metric's description.
#DataType	Primary	Displays the metrics data type.
#OnceOnly	Secondary	The field refreshes only once, then the persisting bookmark is deleted. Add a code with this option to a Smart Excel cell to display the metric value once, after which the same cell updates the metric.
<b>Only List Metrics</b>		
#ListItems_Pipe	Primary	Displays the metric's list items in a pipe-delimited string.
#ListItems_Comma	Primary	Displays the metric's list items in a comma-delimited string.
#ListItems_CR	Primary	Displays the metric's list items in a carriage-return-separated list.
#ListItems_Table	Primary	Displays the metric's list items in a table format.
<b>Only Currency Metrics</b>		
#ProjectCurrency	Primary	The metric's value is given in the project currency.
#CorporateCurrency	Primary	The metric's value is given in the corporate currency.
#Format1	Secondary	The metric value is displayed using the first number format listed in the Currency

Option	Option Type	Description
		reference table.
#Format2	Secondary	The metric value is displayed using the second number format listed in the Currency reference table.

## Long String Metrics Update Options

A metric field for a Long String type metric can update the metric's values when the code is inserted in a Word document. The metric is updated in Accolade when the document is saved back to Accolade. If the document version is created as a link to an external document or web page, the metrics does not update when the document is published. For information on setting up the Word template, see "[Updating Metrics in Accolade From Documents \(Long String Metrics\)](#)" on page 195.

---

**Important!** Long string metric field codes apply only to Word documents and are not applicable in other Microsoft applications. This feature is not supported for related documents.

---

This kind of code has three options. These options cannot be used in non-updating codes, and the options listed in the table above should not be added to updating codes.

Option	Option Type	Description
#Updateable	Secondary	This metric can be updated by the code if this option is present.
#DefaultValue=(value)	Secondary	Displays the text following "=" when the metric is empty in Accolade. If the # character is part of the value, enter "##" in the template.  <b>Important!</b> If there is no default value, a string of spaces is inserted into the field. To edit the field, delete the spaces before entering

Option	Option Type	Description
		text.
#MaxLen=(value)	Secondary	Sets a maximum length, in characters, for the field. The value must be a number under 2000. If this option is not used in the code, the metric field has a size limit of 2000 characters.

 Example

For a Long String type metric named BusiCase:

- The code `{*Metric:BusiCase #Updateable*}` allows the metric to be updated.
- The code `{*Metric:BusiCase #Updateable #MaxLen=500 #DefaultValue=Enter the business case*}`:
  - Would allow the metric to be updated.
  - Would allow the user to enter up to 500 characters in the field.
  - Would display the text "Enter the business case" if the metric was empty when the document was opened.

# Contacting Sopheon

## Customer Support

Customer support is available by email and by telephone. See [www.sopheon.com/contact](http://www.sopheon.com/contact).

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