Sopheon Accolade®

Administration - Website Configuration Training Guide

Version: 17.0

About Sopheon Accolade®

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Contents

About the Accolade Education Program

This module is part of the Sopheon Accolade Education Program (AEP). The AEP modules are designed to help Accolade users perform the tasks in their company's business process using the Accolade application. The content in the modules is meant to be used side-by-side with the application, and is part of the overall documentation suite provided for Accolade.

The benefits of using Accolade as part of your company's innovation development process include the following:

- Reduced cycle time by displaying clear structure and visibility.
- Reduced rework through timely, properly sequenced completion of all key tasks and milestones.
- Assured positive user experience through properly developed product requirements.
- Improved communication by automating collaboration between multifunctional team members.
- Provided decision-making information. Poor projects are stopped or placed on hold so resources can be redirected to more promising and higher value projects and products.
- Provided clear project requirements. Expectations of a project team and project manager at each stage are clearly spelled out.
- Managed business risk. Break resource commitments into increments or stages.
- Established key baseline information and metrics.

The Accolade documentation suite contains the following additional components:

Document	Contents
Sopheon Accolade What's New in This Release	For each release, review this document for an overview of the new features and changes within the release.
Accolade Online Help	Accessible directly through Accolade, the online Help provides comprehensive how-to and reference information about all aspects of using Accolade.
Sopheon Accolade Administrator's Guide	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
Sopheon Accolade Installation Guide	Provides information about the installation of the application and its required databases.
Dashboards for Accolade Installation Guide	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

Document	Contents
Online Help for Accolade Add-ins	Accolade add-ins, including Accolade Office Extensions, Accolade SmartDocuments for Google, Accolade SmartDocuments for Office, Accolade Portfolio Optimizer, and Accolade's integration with Microsoft Project, each include their own Sopheon created Help file accessible directly from the application after the add-in is installed. Each Help file describes how to use the features of that particular add-in.

Prerequisites for Using this Module

The contents of this training module assumes you are assigned the Accolade user roles and have a basic understanding of the terms and concepts listed below and how they are used in your installation. In addition, the content in the related training modules listed below may be helpful before reviewing the contents of this module.

Accolade User Roles

- Administrator
- Template Access

Terms and Concepts

- Accolade Navigation

Related Training Modules

- Getting Started with Accolade

Some web site components that you can configure, such as the logo and splash screens, require access to the Accolade application server. The contents of this module assumes that you have the correct administrative privileges on that server to access the Accolade Administration Console and the directories associated with the Accolade installation.

Configure the Accolade Site Overview

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 do the following:

- Add additional menu items that link to websites, FTP sites, email, local intranet sites, or files available on the company network.
- Add additional fields to deliverables, activities, user accounts, resource pools, and timesheets. Resources and timesheets are available in optional features available for Accolade.
- Design custom pages to display in projects or as menu items within Accolade.
- Translate text displayed throughout the application into multiple languages to support international operations and those employees who speak a different primary language.
- Replace Accolade terminology, such as role names, to those used in your organization.
- Replace logos and splash screens to contain your own company graphics.
- Replace or add to the header or footer that displays on each application page.
- Define which metadata fields are included and where in deliverables and activities.
- Change functional aspects of the application, ranging from whether project IDs are automatically generated to indicating whether to include a week number in calendar controls. The character to use to separate recipients on emails addressed to multiple people. Additional configuration parameters are available in the Administration Console, which can be accessed from the Sopheon program on the **Start** menu on the Accolade application server.
- Set a system wide consent that will prompt users to acknowledge a consent form prior to accessing Accolade.
- Enable portfolio hierarchy navigation to move up, down, and across the portfolio hierarchy for your organization.

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 the online help for information about syncing with Active Directory.

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
Name	Enter the name that identifies the content of the field. The name displays as the row or column label where the field displays.
List Source	*(for List and Multi-List fields only)* Create a query-based list or define a list manually. You define the options for the list much like you do for a list or multi-select list metric. • To create a query generated list, select **Query** and select a query from the box. Click **Edit** to modify the query or click **Preview** to test it. • To manually create a list, select **Defined List** and enter the list items separated by a pipe (|) character, just as if creating a list for a list metric. **Note:** To manually create a list, select **Defined List** 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).
Active	Select one or more of the following options to make the extended field in the following: • **Activities** - Select the check box to make this field available in the **More Details** section within an activity. • **Deliverables** - Select the check box to make this field available in the **More Details** section within a deliverable. • **Pools** - 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. • **Timesheets** - Select the check box to add this field to Timesheet Entry. Resources and timesheets are available in optional features available for Accolade.
Users	Select one ore more of the following options to define additional details when you create user accounts: • **Active** - Select to add this field to the User Admin page used to define user accounts. • **Required** - Select to require a value for this field when creating new Accolade users or updating an existing user.

Field	Description
	• **Searchable** - Select to add this field as a filter to the Select User dialog box. Date fields cannot be selected for user search. The **Maximum Searchable Extended Fields** system parameter defines the maximum number of fields that you can select for user search. The default value is five fields. create a report using the Users subject to determine which users are missing values for required extended fields. • **AD Sync** - 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. 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.
Order	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.

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 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 top open it for editing.
3. Complete the following information about the link:

Field	Description
Name	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.
System Name	Enter a system name that uniquely identifies the global link. The name must be unique among classes and can contain only letters (English alphabet), numbers, and the underscore.
Display in Menu	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. **Note:** This defaults to unchecked when adding a global link. Defaults to checked when a new global link is added from Planning View.

Field	Description
Menu	Select the Menu location. • Select New Menu to create a new menu for the link. • Select an existing menu, such as **Workspace** or **Resource**, to add the global link to an existing menu. To create a global link that is only available to add to a pod within a layout, leave this option blank.
Category	Select the Category location. • Select New Category to create a new category for the link. • Select an existing category such as **My Workspace**, **My Pages** or **Planning**, to add the global link to an existing category. To create a global link that is only available to add to a pod within a layout, leave this option blank.
Link	In the **Link** field, select the link type to create. • **http** - A URL to a Web page. • **https** - A URL to a secure Web page. • **ftp** - A link to an FTP download site. • **file** - A link to a file or executable on your company's intranet. • **qvp** - A link to a Dashboards for Accolade chart if using the Dashboards viewer. • **mailto** - Opens the user's email application and displays a blank email addressed to this email address. • **callto** - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat. In the adjacent field, enter the path to complete the link. For example, if you select **http://** from the **Link** field, enter the remainder of the web site address, www.google.com. 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. The **Disable Link to File** and **Disable Link to Website** parameter settings determine if you can link to web site or file.
Embed	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. **Important!** Accolade respects web browser and web page security features for embedded global links. The linked web page may include certain security settings

Field	Description
	that prevent the web page from loading within the Accolade application window.
Landing	Select this check box to display the linked destination first for the users with the selected role, instead of the users' Home pages. 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.
Default Home	Select this check box to have a designated home page for the selected users. 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. A home page defined by the user profile settings will take precedence over the global link home page setting.
Roles	Select one or more user roles for whom the global link displays. 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.

Exercises - Adding Extended Fields and Global Links

Try out what you have learned!

- Add two different types of extended fields and set them as active for deliverables and for users.
- From the **Administration > User Admin** menu, select your user and see that the extended fields are available in the **Extended Fields** tab.
- Open a project and display a deliverable. Click **More Details** in the deliverable and see that the extended fields are available at the bottom of the More Details content.

- Create a global link to your company's intranet, if you have one, or to a popular website. Add the link to a menu called **Additional Links**.

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 X 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.

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.

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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.

Exercises - Translating and Replacing Text

Try out what you have learned!

- Change the Administrator role name to System Administrator.
- Reset IIS on your application server (if you are in a training environment that will not disrupt others) and open a user record. Notice the change in name for the Administrator role.

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.

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** 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.

Exercises - Replacing Page Footer Text

Try out what you have learned!

- Open the Administration Console on the application server running Accolade.
- Update the **Accolade Page Footer Disclaimer** system parameter to contain something specific to your company and save your change.
- Refresh your instance of Accolade to see the new footer.

Defining Deliverable and Activity Details Display Options

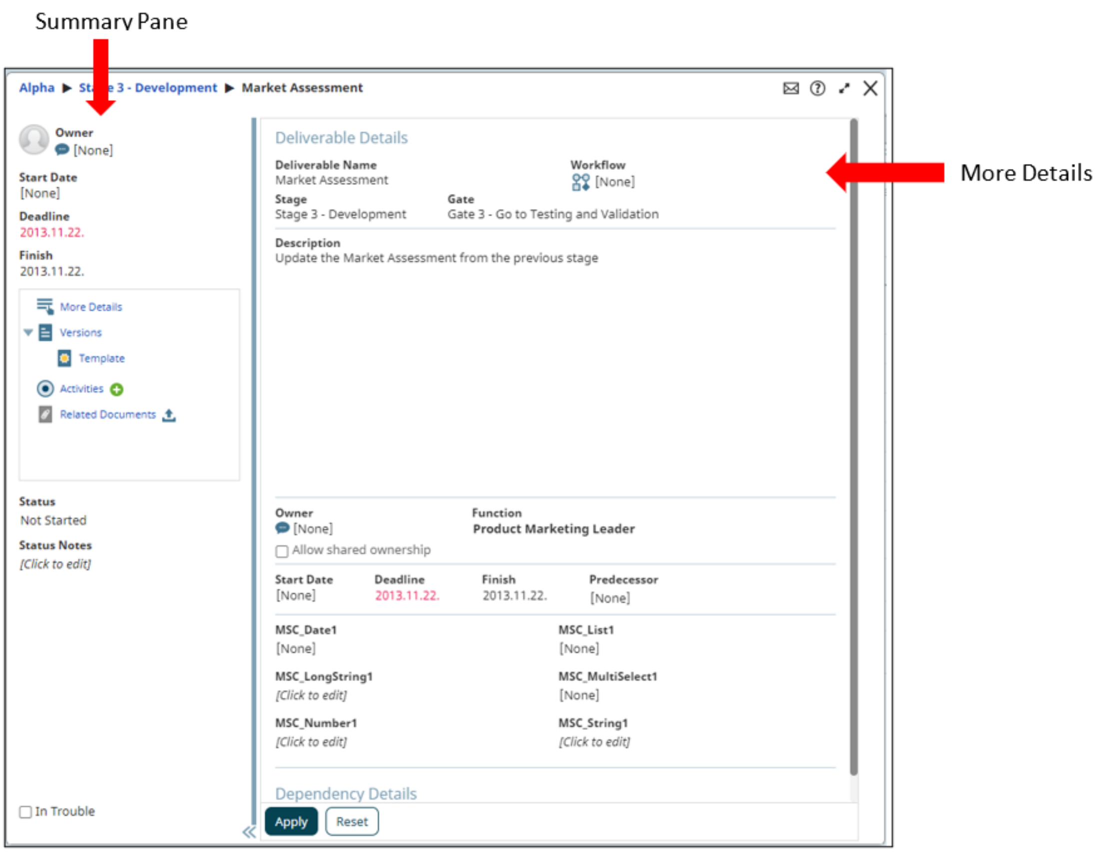
Administrators and Process Designers can define which metadata fields are included when displaying deliverable and activity details and which information displays when initially opening a deliverable or activity. Use these options to show or hide fields that are not applicable in your process flow or 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.

Setting General Parameters

Administrators can control a variety of Accolade behavior through the system parameters available in the Administration Console. Some parameters are available to be set directly within Accolade (**Administration > System Settings > Parameters**) After changing a parameter within the Parameters page in Accolade, you must recycle the application pool on the Accolade website to apply the change.

However, if you change a parameter using the Administration Console, this step is performed automatically.

See the Accolade Parameters topic in the online Help for a list of available system parameters.

To define parameters in the Accolade Administration Console:

1. Log in to the Accolade application server.
2. From the Windows **Start** menu, display all projects and select **Sopheon Accolade Administration Console**.
3. From the **Navigation** list, select **Standard Parameters**.
4. *(Optional)* To narrow the list of displayed parameters, select a category.
5. *(Optional)* Select **Show Advanced** to include advanced parameters in the list.

   Important! Advanced parameters are more likely to have adverse effects on 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.

   ---

6. Click in the **Value** column to set the value for a parameter.
7. Click **Apply** to save your changes before navigating to a section of the console.

   If you navigate away without clicking **Apply**, your changes are lost.

Configuring the Reference Table for the Portfolio Hierarchy Navigator

The portfolio hierarchy navigator is based on the hierarchy relationship type. To ensure that the portfolio hierarchy navigator can be displayed on any page or layout of a project, you must first create a data table and import the data into Accolade. From there, you can add a reference table, include the project process model to the reference table, and verify that the project has at least one default relationship.

- Create a file that contains the data to import.
- Add a file to as a reference table.

Create a File That Contains the Data to Import

The data table contains the data to import to Accolade. Administrators and Process Designers add the initial versions of the **ACC_PortfolioHierarchyLevels** data table. The assigned table owner, which requires the Reference Table Manager user role, can add new versions of the table as needed.

Create a spreadsheet file titled **ACC_PortfolioHierarchyLevels**. Column headings are in the first row of the worksheet.

Ensure that the contents of the file meet the following requirements:

Component	Requirements
ModelName	This is the name of the process model.
Level	Enter an integer specifying the item's level in the list hierarchy. The level numbers specify the parent-child relationship in the hierarchy. 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.
HierarchyName	This is the name of the hierarchy to which a process model belongs.

Example

Simple Single-Hierarchy Use Case

	A	B	C
1	**ModelName**	**Level**	**HierarchyName**
2	Company	1	Business
3	Business Units	2	Business
4	Business Unit	3	Business
5	Project Type A	4	Business
6	Project Type B	4	Business

ACC_ PortfolioHierarchyLevels

Ready

Advanced Multiple-Hierarchy Use Case

	A	B	C
1	**ModelName**	**Level**	**HierarchyName**
2	Company	1	Business | Strategic
3	Business Units	2	Business
4	Business Units	3	Business
5	Project Type A	4	Business | Strategic
6	Project Type B	4	Business | Strategic
7	Strategic Initiative	2	Strategic
8	Objective	3	Strategic

ACC_ PortfolioHierarchyLevels

Ready

Note the following in the example above:

- The Simple Single-Hierarchy Use Case is set up by using a consistent name in column C (HierarchyName). It references the appropriate process models in column A (ModelName), and assigns the model's level correctly in column B (Level).

- The Advanced Multiple-Hierarchy Use Case shows how to display multiple hierarchies that can be present within a company. Notice column C (HierarchyName) uses a | delimited list. This represents each hierarchy to which a specific process model can belong.
- In the Advanced Multiple-Hierarchy Use Case, Project Types A and B can both belong to an Objective in the strategic hierarchy and a Business Unit in the business hierarchy. The hierarchy name displays above the portfolio hierarchy navigator, allowing users to change which hierarchy they see.
- Adding multiple hierarchies to column C is possible. To add more than two hierarchies, insert additional | delimited hierarchies as needed.

Adding the Reference Table to Accolade

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

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

> **Notes:**
>
> The following rules apply for reference table setup:
>
> - A level 1 process model must exist. In most cases, this is a corporate level portfolio.
> - A process model can exist on one level only. It cannot be listed twice in the reference table on different rows.
> - Hierarchies can skip levels.
>
> The hierarchy navigation metrics must be associated with all process models listed in the reference table.

Enabling Portfolio Hierarchy Navigator

Administrators and Process Designers can enable Accolade to display the portfolio hierarchy navigator. With the portfolio hierarchy navigator enabled, you can navigate up, down, and across the portfolio hierarchy for your organization. This feature also enables roll-up reporting at any level in a portfolio hierarchy, allowing you to aggregate data from multiple sources.

To display portfolio hierarchy navigator:

1. From the **System** menu, select **System > Settings,** then select the **Parameters** tab.
2. In the **Hierarchy Navigation** drop-down menu, ensure that the following options are checked:

- Display closed projects in breadcrumb dropdowns
- Navigate to project home page

Displaying Portfolio Hierarchy Navigator

To view information across different levels within Accolade, you can use the portfolio hierarchy navigator. With this setting enabled, you can go up or down in the portfolio hierarchy and view projects that are related to each other (such as child, parent, grandparent, *etc*.) at a glance.

To display the portfolio hierarchy navigator:

> **Note:** This option is only possible if the following conditions are met: You have created a reference table for portfolio hierarchy levels, the project process model is in the reference table, and the project already has at least one existing relationship. If the project has no parents or children, the portfolio hierarchy navigator does not display.

1. In any Accolade project that meets the above criteria, click next to and in the upper right corner of the page.
2. Click **Show Hierarchy** to display the portfolio hierarchy navigator. This option is set to show hierarchy by default. You can hide the portfolio hierarchy navigator by following the above steps and selecting **Hide Hierarchy**.

To view the hierarchy board:

> **Note:** This option is only available to users with the Planner role.

1. In any Accolade project that meets the above criteria, click next to and in the upper right corner of the page.
2. Click **View Hierarchy Board** to display parent-child relationships on the hierarchy board.

In Accolade 17.0 and later, users have the option to display class icons in the Hierarchy Menu. Class icons enable users to easily distinguish between projects of the same name in different business units and access groups. Class icons are hidden by default.

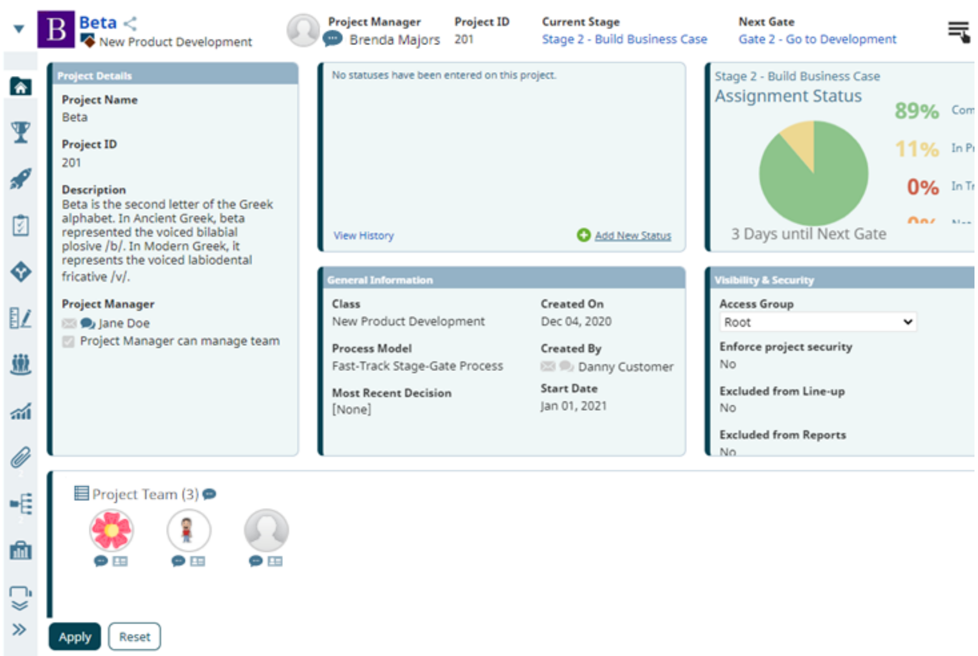
To show or hide class icons on the Hierarchy Menu:

1. Navigate to the Hierarchy Menu on the right of the screen.
2. From the drop down menu, select either "Show Class Icons" if hidden, or "Hide Class Icons" if you wish to disable this feature.

> **Note:** Because this is a user setting, it will be remembered even if the user logs out or the system is upgraded.

Page Layouts and Pods Overview

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



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

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

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

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

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

Creating Page Layouts

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

To create a page layout:

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

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

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

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

3. Enter the following information to identify the layout:

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

Field	Description
Name	Enter a name, up to 64 characters long, which identifies the layout.
System Name	Enter a unique, shorter name that identifies the layout in queries, reporting views, field codes, and other places in Accolade. The name must be unique among layouts and can contain only letters (English alphabet), numbers, and the underscore.
Icon	Select the icon and icon color to be used for the layout.
Description	Enter a description of the purpose or nature of the layout. This description helps other users identify the layout throughout the system.
Category	Enter or select the group to which this layout belongs. Use categories to organize like layouts together. For example, you may choose to group all the layouts used for global layouts into the same category, in order to separate them from layouts that are used in process model configuration. • Leave this field blank to add to the **Default** category.

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

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

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

4. Click **Save** in the lower right corner of the page to save changes, **Save and Close** to save the configuration and close the editor, or **Cancel** to close the editor without saving changes.
5. Continue with any one or more of the following steps to complete and implement the layout:
   - Add one or more pods or comparison sets to the layout. Without at least one pod, the layout is blank.
   - Associate the layout with one or more existing gated, non-gated, or idea models to include it in projects based on that model.
   - Add the layout as a global link to display the page outside of a project.

Notes:

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

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

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

Available Pod Types

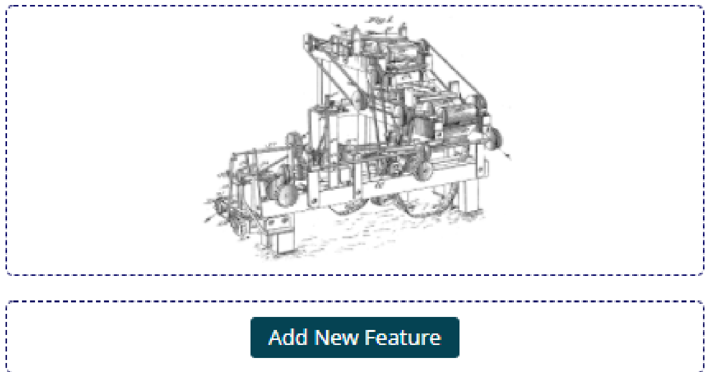
Page layouts can contain one or more pods to display information. Each pod can contain a single element, such as one metric, one global link, or one image. Review the following information about the types of pods available and their potential uses.

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

Pod Type	Notes

layout, can be clicked to create projects and/or project links directly from the page. Click ⚙ when defining the pod to select a process model and process links as necessary. Note that project links cannot be created for pods used on a global layout.

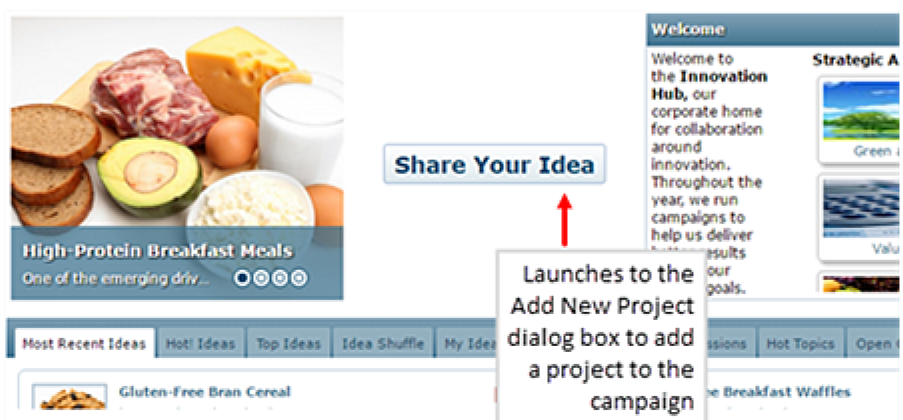
EXAMPLE Example



Multiple Add New pods can be used on a layout, each with different combinations of process models and link types.

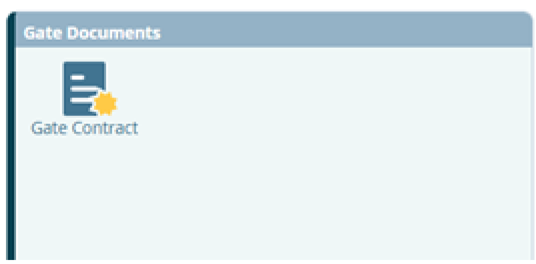
- **Create Child Project** - Creates a button that, when added to a project page layout, can be clicked to create a new project directly from the page.

EXAMPLE Example



Note: The **Create Child Project** button is part of Ideation.

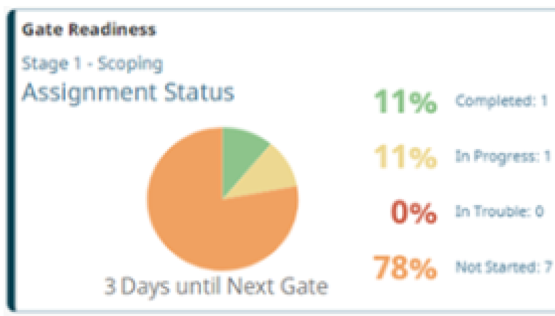
The ability to add a new project using the **Add New** or **Create Child**

Pod Type	Notes
	Project button on a project page requires Add Project rights for the default access group (if one is assigned) or for the parent project's access group (if there is no default access group specified).
Chart	Adds a pod that contains a chart created using Accolade. Charts are visual representations of the data within a report. In order to add a chart to a pod, the chart must be set as **Available to Configuration** and the chart access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the chart to be available for them to use in the layout. Viewing a chart's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the chart to display.
Documents	Adds a pod that contains document types pertaining to a single project when the layout is included as a page within a project. The **Gate Documents** selection includes a pod that contains gate documents that display on a project. Gate owners and those with appropriate editing rights can upload and download versions, download and edit the associated template, and select which version to publish. If a layout containing a gate documents pod is assigned to a specific gate, the associated gate documents display. If the layout containing the gate documents pod displays as a project page, the gate documents specific to the current project gate display. Example  **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected.
Gates	Adds a pod that contains gate information and capabilities for users on project teams. **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected. Select from the following options:

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

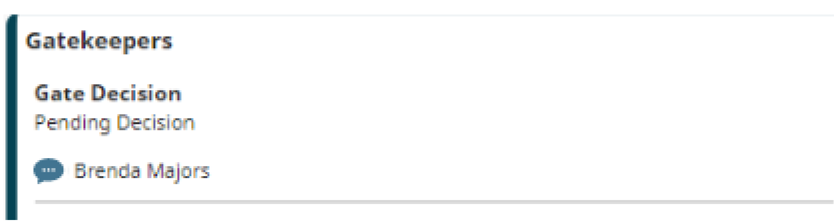
- **Gate Readiness** - Provides a graphic that indicates the health of a project stage, to help determine at a glance how ready the project for an upcoming gate meeting. The pod includes the how many days until the next gate meeting and a status of the assignments with the current stage. Deliverables and activities are grouped together and considered "assignments" in this pod, and any item set to Not Required in the project is not included in the calculations. Deliverables set to In Trouble and Not Started are represented by a red and grey pie slice respectively.

  Example

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

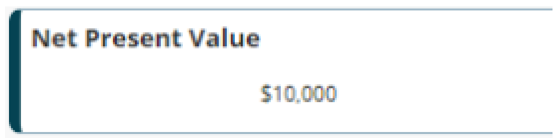
  Example

- **Meeting Dates** - Adds a pod that displays meeting information for a project. Gate names display with the meeting date below it. Users with rights to change gate dates such as Process Manager, Idea Managers, or Project Managers can edit meeting dates directly in the pod. All users on a project can see meeting information centrally located in this pod. Additionally, the

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

Pod Type	Notes
	gate name takes users to the corresponding gate page when clicked. Click when defining the pod to set the number of columns the meeting information displays. The pod information wraps from left to right across the pod to populate the columns set. Meeting date calculation settings and restrictions still apply. Example 
Global Links	Adds a pod that displays the content of a global link, such as an intranet page, a Dashboards for Accolade report, or a planning view from Innovation Planning. Based on your server setup, only defined http, https, and relative file global links are available to add to a pod. **Important!** Accolade respects web browser and web page security features for embedded global links. The linked web page may include certain security settings that prevent the web page from loading within the Accolade application window. If you select an Innovation Planning view defined as a global link to display in a pod, and the layout is intended for use within a project page, select the **Filter to project** option to display the view filtered to the project ID saved as part of the global link configuration. **Note:** The filter functionality does not apply to composite planning views.
HTML Report	Adds a pod that displays the content of a specified HTML report. Available HTML reports display in the **Content** field.

Pod Type	Notes
	In order to add an HTML report to a pod, the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout. Viewing a report's contents within a page layout does not require Reporting Rights, however, a user must be an owner or have at least one matching user role for the report to display.
Metric	Adds a pod that can contain a single metric and displays the currently assigned metric value. Metrics within pods display as read-only. EXAMPLE Example  To include the metric's name, add the name as the title of the pod. **Important!** Long string metrics with the **Rich Text** check box enabled cannot be added to pods.
Planning View	Adds a pod that displays a planning view from Innovation Planning in read-only format to any user who does not have the Planner role. Click when creating the pod to define the planning navigation options that are displayed within the pod. Only planning views made public will display in the content drop-down for the pod. If the layout is intended for use within a project page, check the **Filter to project** option to display the view filtered to the project ID. The filter functionality does not apply to composite planning views.
Plugin	Adds a pod that displays a configured plugin. Click when defining the pod to set the properties, attributes, and default settings of the plugin.
Portfolio Optimization	Adds a pod that contains information typically used when creating layouts for portfolio optimization purposes. The **Projects Grid** selection includes information for all projects in the loaded portfolio that a user has access to, and that are included in a class with the **Include in Portfolio Optimizer** option selected. Click when creating the pod to define the default set of data columns that display in the pod.

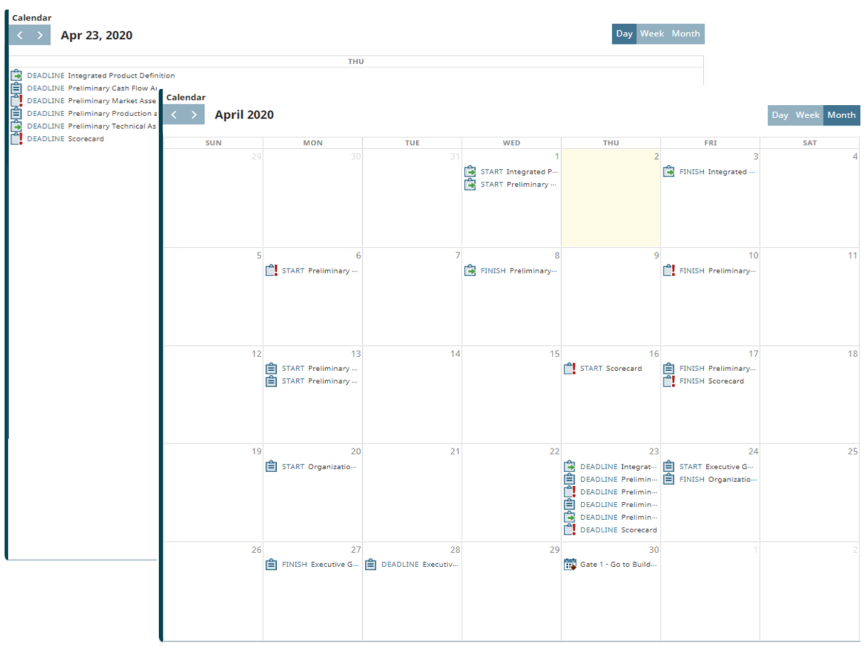
<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td>Productivity</td><td>
Adds a pod that contains productivity-related elements to assist with managing projects and timelines.

Important! For pods that are used in the personalized home page layouts, Administrators and Process Designers with the Template Access role can make changes to home page layouts on a global level by clicking when defining the pod, for example, to add company landing page hyperlinks to the Quick Links pod for all users, or to add additional information at a company level. Changes at an individual level should be made by the user from within their personal view.

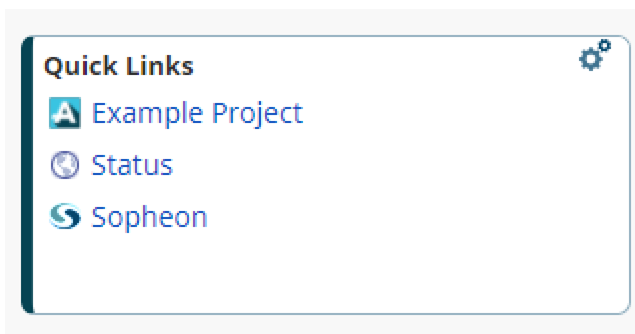
Select from the following options:

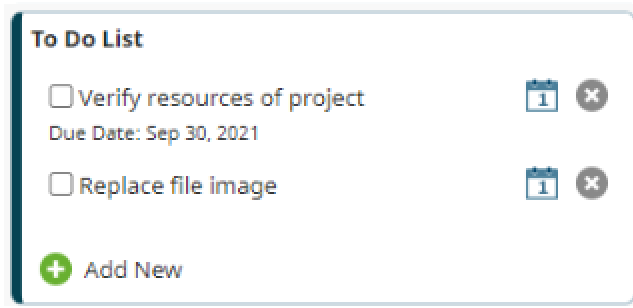
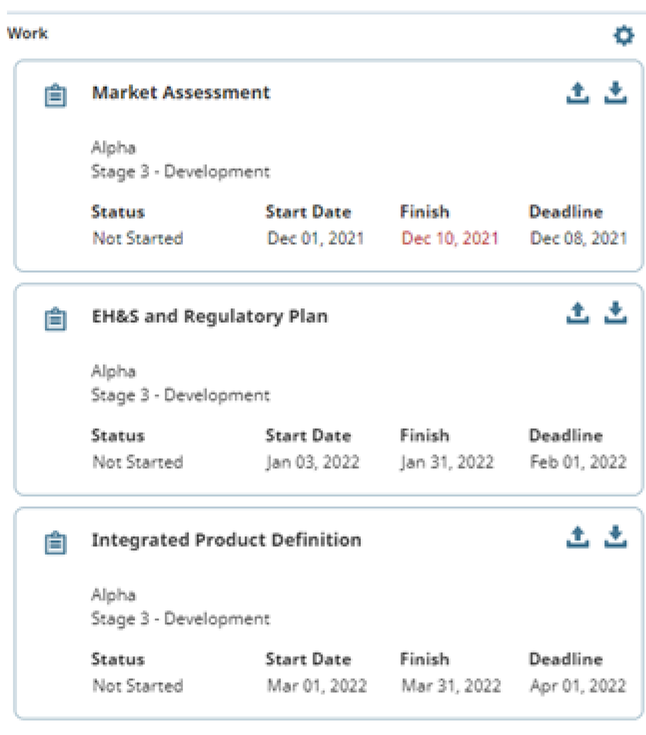
• Calendar - A pod that displays a calendar, allowing users to visually display important dates such as start and end dates for deliverables and activities, deadline dates for workflows, and project gate dates. Double-clicking on an event takes the user directly to the event details or applicable project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

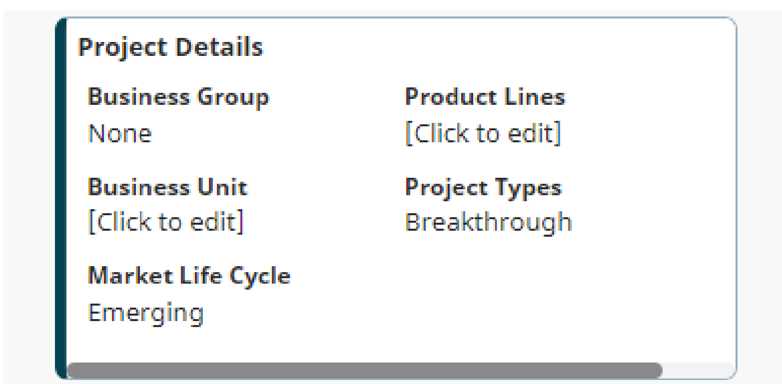
EXAMPLE Example



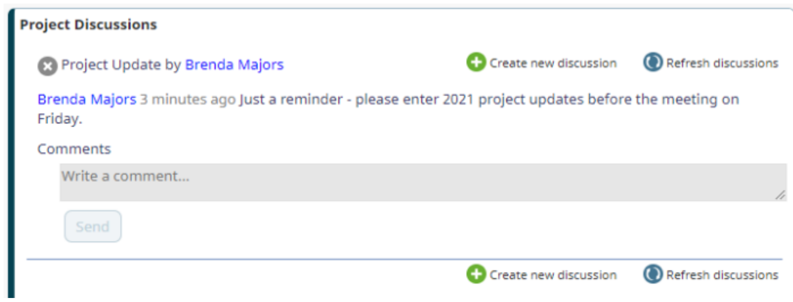
• Countdown - A pod that allows users to display a countdown of days until the occurrence of an important date or event of their choosing. Click when defining the pod to set the event name and date, and to select an image to display in the pod.
</td></tr>
</table>

Pod Type	Notes
	Example  • **Quick Links** - A pod that allows users to display a list of frequently used links to projects, websites, and other global links defined in Accolade. Click when defining the pod to select existing Accolade links, or to create customized links. Example  • **To-Do List** - A pod that allows users to create individualized worklists by adding tasks to a personalized list, in order to keep track of their tasks and check off items as they are completed. Example

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

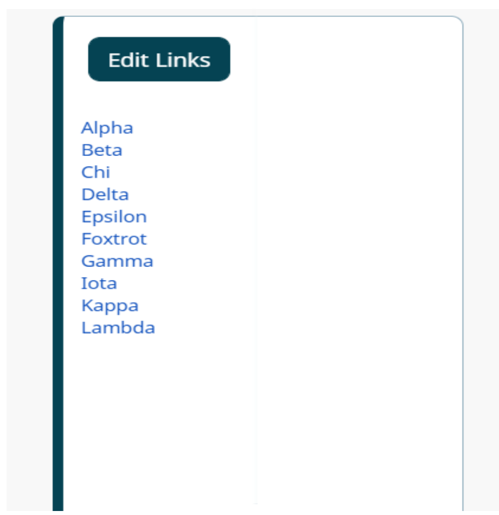
Pod Type	Notes
	Adding the Work pod to a project displays information for just that project. The Work pod also displays on the **Comprehensive** and **Focused** home page layouts, the **All My Work** page, and the **Upcoming Gates** page where it provides users with a view of everything assigned to them throughout Accolade. For more information, see Viewing Your Work.
Project Image	Adds a pod that is populated with the project's assigned main image or the thumbnail image, based on your selection.
Project Information	Adds a pod that contains information about a single project when the layout is included as a page within a project. **Note:** These pods are not available for selection if the **Create global link** option for the layout is selected. Select from the following options: • **Data Form** - Provides a place to show and edit project metadata and metric information. Click when defining the pod to select the project metadata fields and metrics to include in the pod and define how many columns the pod contains. When the pod displays in a project, metric and metadata fields are editable based on a user's role and permissions within the project, unless the data is checked as read only. Long string metrics with the **Rich Text** check box enabled cannot be added. Example  • **Discussion** - Includes a pod that includes the Accolade discussions functionality, providing contributors to discuss ideas directly on the page. Example

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



Links - Provides a pod which supports adding and removing links. Click when defining the pod to indicate the Link Name, Process Models and filters used to identify the linkable items to be presented to the user, as well as the button text and a tooltip. When used, the pod shows any items already linked, and allows the user to select new items to be linked, as well as offering the possibility to remove links. Only items matching the filters set by the Process Designer are shown to the user. If desired, you can indicate that filters may be changed at runtime by the user.

EXAMPLE Example



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

</td></tr>
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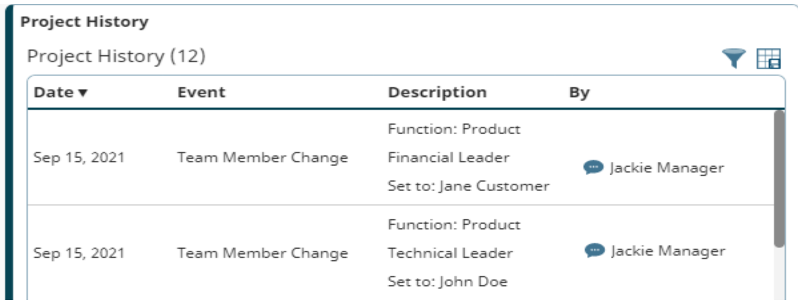
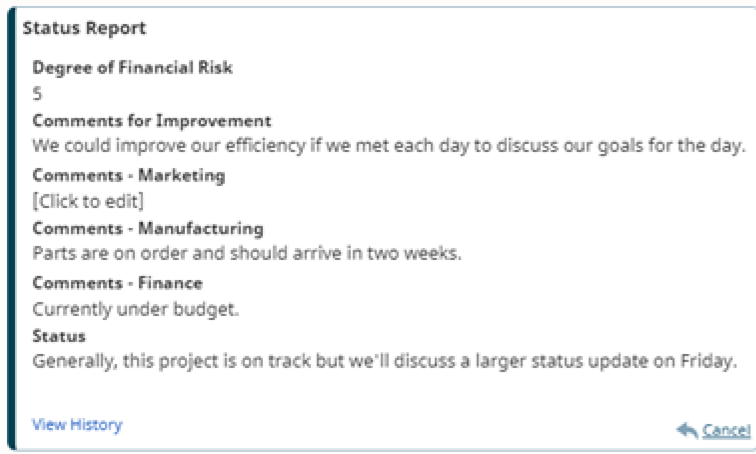
<table>
<tr><th>Pod Type</th><th>Notes</th></tr>
<tr><td></td><td>
meeting the filter criteria displays on the pod. Users on projects can still filter project history when the layout displays on a project page, but they cannot save their filter preferences when filters are set on the pod configuration.
Example


Project Status - Provides a place to show and enter status reports for the project. The pod also provides a link to view the project status history. To allow the entry of new project status reports, select the Use master buttons option on the layout that contains the pod. If the master buttons are not included, the content of the project status pod displays as read only.
When the pod displays in a project, the ability to add a project status is based on the user's roles and status permissions on the project team. Metrics are editable based on the metric's presentation settings for Status Report within the process model.
Example
</td></tr>
</table>

Pod Type	Notes
	 • **Report List** - Provides a list of available reports to add to the pod. Click when defining the pod to select the reports list that displays. See Associating Charts and Reports to Process Models for more information. • **Security List** - Provides a place to display and edit defined security lists. Click when defining the pod to select the security list that displays. Only one security list can be selected to display in a pod. Users with certain management rights and allowed access can modify the security list when the layout displays on a project. Additionally, users can only modify levels of a given security list to which they have access. Other levels of the security list display as read only in the pod. • **Team** - Provides a place to display users assigned to projects including project manager or team leader, project team members, workflow action owners, and gatekeepers. Click when defining the pod and select Project Team, Workflow Action Owners, or Gatekeepers. Only one group of users can be selected to display per pod. If the **Enable User Profile Images** is disabled, the **Detail View** becomes the default view. Click and in the top left corner of the rendered pod to toggle between simple and detail views. EXAMPLE Example

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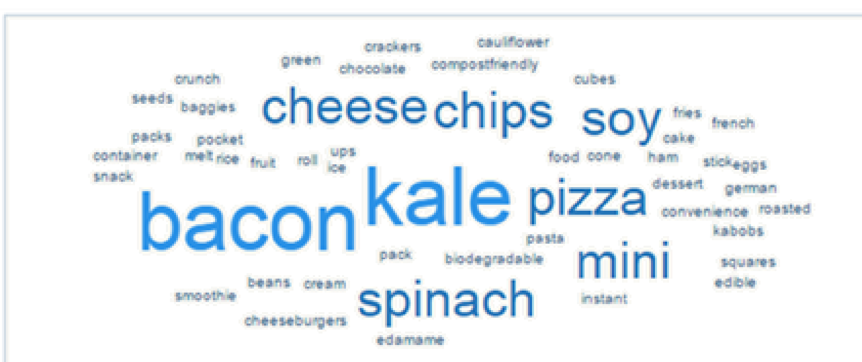
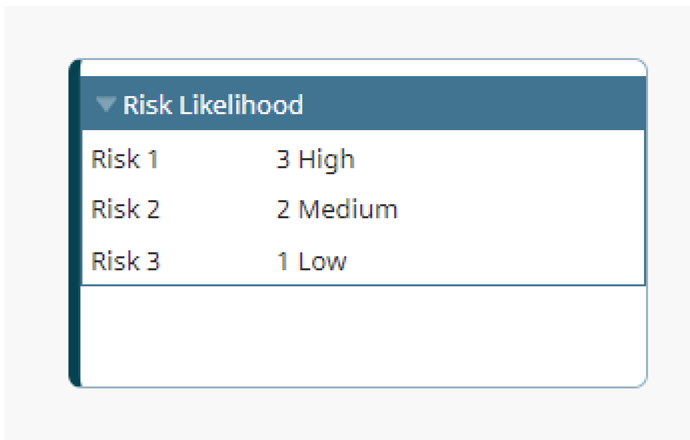
- **Trended Number Metrics** - Provides a way to display trended metric data in a pod with a layout. Pod settings provide options to set metrics and trended metric dates that display in a table. For portfolios, number metrics with Track History turned on are trended for projects linked with hierarchy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

EXAMPLE Example



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

Pod Type	Notes
Quick Grids	Adds a pod that contains a quick grid assigned to a project. Only active quick grids are available to add to a pod. Process Managers and Idea Managers with Manage Process rights, and a project's assigned Project Manager, have access to enter data in a quick grid within a pod displayed within a layout-generated page in a project. Click when defining the pod to enable **Read Only Quick Grid**. Quick grids set as read only can not be edited. EXAMPLE Example  **Note:** Matrix quick grids added to a pod do not contain filtering options at this time.
Report	Adds a pod that contains an Accolade online report. In order to add a report to a pod, the report must be set as **Available to Configuration** and the report access groups must match at least one access group of the layout. Additionally, Process Designers must have "Can Edit" on at least one of the matching access group permissions in order for the report to be available for them to use in the layout. Viewing a report's contents within a page layout does not require Reporting Rights; however, a user must be an owner or have at least one matching user role for the report to display. Configure additional settings available for report pods including a download option and page size.
Report Groups	Adds a pod that contains the content settings for a comparison view layout. Click when defining the pod to select the reports and charts available to a comparison view page layout. **Note:** The report groups pod is created as a part of creating a

Pod Type	Notes
	comparison view page layout, and is not independently available at this time.
Task Board	Adds a pod that displays a project's current stage's task board. This task board categorizes all deliverables and activities into columns with respect to their current statuses, namely "Not Started", "In Progress" or "Completed", allowing you to follow the progress of each deliverable and activity more efficiently, and easily move them between statuses. With this task board, team members get a visual representation of their work in a more collaborative view, and are able to identify bottlenecks quicker.
Template Image	Adds a pod that displays an image saved to the Template Library (with a template type of **Image**). To add a new image select **Add New** from the **Content** list. Items added here are also added to the Template Library.

Adding Pods to Page Layouts

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

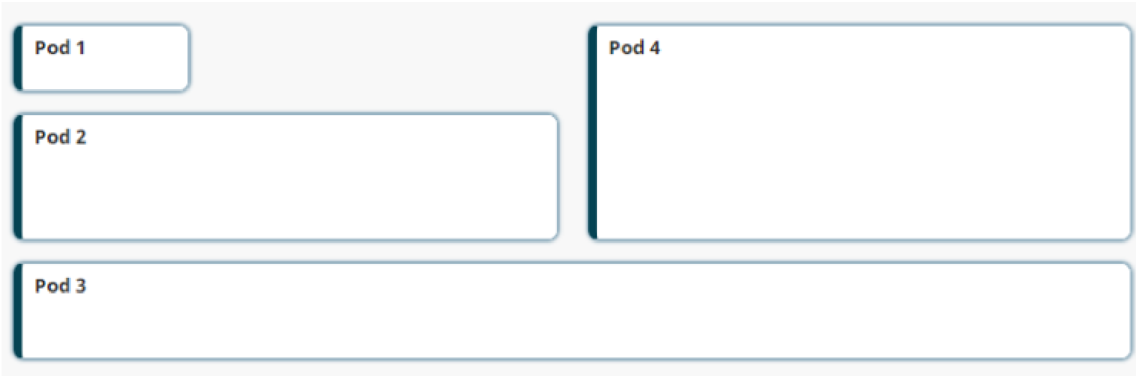
Note: When viewed, if a user does not have access to the content assigned to a pod within a layout, the message "No Data Available" displays in that portion of the layout.

To add a pod to a layout:

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

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

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



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

Pod Details	Description
Type	Select the general type of content that displays within the pod. The type narrows down the pod contents available and correlates to an action or area of the application. If you select an Innovation Planning view defined as a global link to display in a pod, and the layout is intended for use within a project page, select the **Filter to project** option to display the view filtered to the project ID saved as part of the global link configuration. The filter functionality does not apply to composite planning views. See "Available Pod Types" on page 31 for information about the types of pods available.
Content	Select the content to display in the pod. The list available in the content field is narrowed based on the **Type** selected. For example, if Quick Grids is the pod **Type**, only quick grids display for selection. Some pod content selections also include advanced settings options to be defined, such as selecting default information that displays in a pod. **Note:** The available content that displays for selection is based on your access group permissions as defined in your user profile. Only elements that the user has "Can Edit" access for, are in a child access group of the layout, or are already attached to the layout will be available for selection. Additionally, access group settings for the content selected must match the permissions of other users in order to display for them.
Name	*(Optional)* Enter a name that displays as a heading above the pod.

Pod Details	Description
	If a pod does not have a name, the pod displays in the layout without a heading. If **Buttons** is selected as the pod **Type**, this field changes to **Button Text**, where you can enter text that displays within the button shape.
System Name	Enter a unique, shorter name that identifies the pod in queries, reporting views, field codes, and other places in Accolade. The name must be unique among layouts and can contain only letters (English alphabet), numbers, and the underscore.
Allow maximization	Select the check box to display the maximize icon on a pod. The maximize / minimize capability is only available for pods that have a heading defined on the pod, and appropriate icons display for users to render the pod larger or smaller.
Show Download Icon	*Setting only available for report pods containing Accolade online reports.* Select the check box to display the download icon and make the report available for download from within page layouts.
Page Size	*Setting only available for report pods containing Accolade online reports.* Enter the number of report rows to display within the pod. The report will page within the pod for subsequent rows. Maximum number of rows is set to your Reporting Office Extensions Record Limit parameter (default 50,000).
Title	
Text Alignment	Select an alignment option to position the pod title. Text defaults as Left aligned.
Font size	Enter the title font size in pixels.
Font color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the font color for the title. **Note:** If the pod contains a quick grid, the font color defined on the quick grid configuration overrides the font color set on the pod. If no font color is defined on the quick grid, the font color defined for the pod applies.
Content	
Font size	Enter the font size in pixels for the pod content text.
Font color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the font color for the pod content text.

Pod Details	Description
Background color	Select a background color, enter a hexadecimal color code, or enter its RGB or HSV value to set the background color of the pod content.
Vertical Bar color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the background color of the vertical bar that displays on the pod.
Border	
Style	Select how the border displays around the pod.
Size	Enter the weight of the border in pixels.
Color	Select a color, enter a hexadecimal color code, or enter its RGB or HSV value to set the border color.

Please note that project information will not be displayed as you are building the layout. For a limited preview of your layout, click in the top right corner of the page. To see a completed display, save the layout and view it in its context within Accolade.

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

Notes:

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

Adding Page Layouts as Accolade Pages

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

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

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

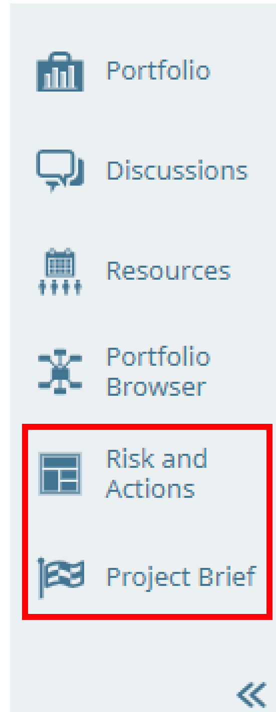
   Identify layout links by their link name, which starts with /Layout/Layout.
3. Update the information as necessary.

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

Adding Page Layouts as Project Pages

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

To add a page layout as a project page:



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

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

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

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

Exercises - Creating Page Layouts

Try out what you have learned!

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

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