Sopheon Accolade®

Getting Started Training Guide

Version: 17.0

About Sopheon Accolade®

Document Name:	Getting Started Training Guide
Document Version:	1
Software Version:	Sopheon Accolade 17.0
Document Date:	August 2024

Ownership of Software and Documentation

Copyright Notice

Trademarks

No Warranty

Patents

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.

General Navigation and Data Entry in Accolade

You can navigate through the Accolade pages much like you do other Internet sites using links, buttons, and icons, and enter data in fields. Use the following information to learn about general navigation and entering data within Accolade.

Navigating the Application

Use the menu bar to navigate Accolade with the following components and actions:

- Access main pages within Accolade. Click on menus to view contained sub-menus.

  Regardless of where you are in Accolade, you can always return to one of these top-level pages by clicking its menu item. Your assigned user roles determines which menus and menu items you can see. Some menus and menu items are specific to your company, and some may link to locations outside Accolade. The menu bar includes the search feature, access to the online Help, and access to individual user profiles.
- Click to return to recently visited pages, including projects and documents.
- Go to and set your Home page. Click the Accolade logo to return to your set Home page at any time.
- View your user profile, where you can select your date format, display language, subscribe to reports, subscribe to notifications, and add your own menu items.
- Search for projects and documents.
- Access the online Help.
- Submit an Enhancement Request.

Saving Your Changes

After you enter data on an Accolade page, save your changes before leaving the page or the changes are lost.

> **Note:** As you make changes in Accolade Innovation Planning, changes are saved automatically.

Clicking the following buttons saves or clears the data entered on a page:

- **Apply** - Saves data entered or edited on a page. Click **Apply** before you leave a page to save the data you have entered or modified.
- **Reset** - Restores a page's data as it was the last time the page was saved. Use **Reset** to remove mistakes that you catch while you are entering data.
- **Create** - Creates and saves a new object such as a project or activity. Functions the same as **Apply** but displays when creating something new.
- **Add** - Adds a new object, such as a team member to a project.

- **Delete** - Deletes the selected object such as a report or deliverable version. Deletions typically cannot be undone.

To ensure that you save your work when working on an online form, click **Save/Apply** periodically as you are working on completing the form. You should always save your work if you are interrupted and need to change to a different task. If you make changes to an online form and Accolade times out due to inactivity before you save, the changes made since the last save are lost.

Entering Text

Text boxes that are not numeric in nature accept text, for example, Project Names, System Names, and Descriptions, among others. Special characters are often not accepted in text fields.

Entering Numbers

Some text boxes in Accolade are meant to accept only numbers. In such numeric text boxes, the input field will only accept the following characters:

- The Arabic numerals including 0 1 2 3 4 5 6 7 8 9 0
- A character to indicate the "decimal point," for example, a period or comma. The language setting in Accolade determines the character used as the decimal point in larger numbers and the group separator.
- A dash used to identify a negative value. This character must be entered as the first character in the text box.

Administrators define how many decimal places currency or other numbers accept. For example, if a currency can accept two decimal places, you will not be able to enter a third. Or if the metric has been defined to accept zero decimal places, you will not be able to enter a decimal point.

These restrictions are in force in:

- Number type metrics
- Numeric fields in online forms
- Resource planning pages
- Numeric filters in locations such as the Search, All My Work, and Upcoming Gates pages.

Entering Dates

The date format selected in your user profile determines how you enter dates in date fields throughout the system.

- Enter dates manually using your selected date format. For example, MM/dd/yyyy, dd/MM/yyyy, or MMM dd, yyyy. Check your user profile if you are unsure what date format to use.

  The default date format is MMM dd, yyyy (Feb 28, 2016).

- Select a date from the calendar.

Use the arrows to scroll from month to month or use the date and year drop-downs to display a different month and year. Use the buttons at the bottom to navigate back to today's date or the currently selected date.

To display a week number for each row in the calendar, Administrators can enable the **Show week number in calendar controls** system parameter. When enabled, weeks begin on Monday instead of Sunday.

Preventing Inactivity Timeouts

If your Accolade session is inactive for an extended period of time, the application can automatically log you out. If so, you lose any unsaved work, and you must log in again to continue working. To avoid timing out, move to a different page or click your web browser's **Refresh** button before you are logged out. Administrators configure the length of the time-out period for your site. Before the website times out, a message box gives you a 60 second warning to refresh the page.

Online form deliverables also have a time-out period that is usually the same length of time as the Accolade time-out. When you open the working copy of an online form, the time-out period starts for that deliverable. The time-out period restarts each time you save the form. To avoid losing your work in an online deliverable, save the deliverable if you are interrupted prior to completing it.

User Roles and Assignment Types

Each Accolade user is assigned one or more user roles that determines which 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 menus available in the menu bar.
- Tasks the user can complete.

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, permissions assigned within that hierarchy, and on the user’s security profile, if any.

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

Within a project, users with roles that allow them to be part of the project, for example, Process Manager, Gate Manager, and Project Team Members also have assignments within the project. Their assignments within a project determine the actions they can take within that project.

Click your user icon in the top right corner of the page and click **My Profile** to determine the user roles you have been assigned.

Accessing Projects and Documents

Information in Accolade is secured through its visibility access, which controls what each user can and cannot access throughout the application. At a high level, your user role and user assignments within a project determines your project and document access. Whether a document is published or unpublished determines your accessibility to the document through Search.

Note: You may be asked to select a location when you access Accolade. Your selection can restrict your access to projects and information to only those allowed to be viewed from that location. It is possible that you have access to information in one location that you do not have access to in another location. Restrictions are in place to ensure your company's intellectual property is not in danger based on the laws and regulations in various countries.

Projects Access

Project access is determined by whether you are a member of a project team (including current and delegated action owners in workflows) and whether you are assigned the appropriate access groups, security profiles, and security lists that further restrict the information you can and cannot see within Accolade. These are defined at the system level and are specific to your company and how your company has set up access security. To view your access definitions, click your user name in the Accolade title bar to display your user profile.

Some users have edit access to a project, and some have view-only access to a project. Your role on the project team determines what types of information you can view or edit within the project and whether you have upload and download rights to documents within the project.

Document Access

Your assignments within a project and whether a document is published determines your access to a document and whether you have permission to upload, download, or edit a document. Only published documents return in searches. Publishing allows document owners to choose when to make a document's contents available to Accolade users who are not part of the project team.

Document Type	Access Notes
Deliverable and Activity Documents	For most deliverables and activities, users who have access to a deliverable or activity within a project also have access to view the latest version of the document attached to the project. If a deliverable or activity document is published, all users with access to Quick Search, Advanced Search, or the project through the correct access group assignments, can view the latest published version of the document.

Document Type	Access Notes
	Depending on how the deliverable or activity is configured in the model, access may also be restricted by user role. For deliverables and activities set up with these restrictions, users must also have the user roles assigned to the deliverable and activity within the model to view and download templates, the latest version within the project, and to published versions through Quick Search and Advanced Search. Without the assigned user role, users cannot access any content or details for the deliverable or activity. Deliverable documents are available on the **Stages** page within a project. To access deliverables in projects that you are assigned the owner to, or are assigned as a Document Reviewer, use the **All My Work** page available in the **Workspace > My Workspace** menu. Users who can view deliverable and activity documents typically include the following: • Executive (published only) • Gate Manager assigned as the gate owner (published only) • Document Reviewers • Document Owners • Other members of the project team, including the project manager • Idea Manager • Process Manager Users who can add a version of a gate document within a project include the following: • Document Owner • Idea Manager • Process Manager • Project Manager A Process Manager with Manage Process rights or the assigned project manager can publish or unpublish an existing version, but cannot add and publish a new version unless the document has no owner.
Gate Documents	Users who have access to gate information within a project also have access to view the latest version of a document attached to a gate. If a gate document is published, all users with access to Quick Search, Advanced Search, or the project can view the latest published version of a gate document. Gate documents are available on the **Gate** page within a project. To access gate documents in gates in which you are the assigned gate owner, use the Work pod on the **Upcoming Gates** page available in the **Workspace > My Workspace** menu. You can also view a list of upcoming gate meetings from the **Upcoming Gates**

Document Type	Access Notes
	page. Users who can view gate documents typically include the following: • Executive • Gate Manager assigned as the gate's owner • Members of the project team, including the assigned project manager • Idea Manager • Process Manager • Resource Planner Users who can add a version of a gate document within a project include the following: • The assigned gate owner • Idea Manager • Process Manager • Project Manager A Process Manager or the Project Manager can publish or unpublish an existing version, but cannot add and publish a new version unless the document has no owner.
Related Documents	Related documents can be added to the project, or to a deliverable or activity within the project. Users who have access to information within a project also have access to view the latest version of a related document attached to the project. Users who have access to a deliverable or activity also have access to the related documents attached to the deliverable or activity. Related documents attached to the project are available on the **Related Docs** page within a project. Users who can view related documents within a project typically include the following: • Executive • Gate Manager assigned as the gate owner • Members of the project team (team members, project manager). • Idea Manager (for idea projects) with Manage Process rights • Process Manager with Manage Process rights • Resource Planner If a related document is published, all users with access to Quick Search, Advanced Search, or the project can view the latest published version of the document, if they have access to the project through their access group associations.

Document Type	Access Notes
	For deliverables and activities set up with user role restrictions, users must also have the user roles assigned to the deliverable and activity within the model to view and download related documents that are attached to the restricted deliverable or activity. Related documents attached to a deliverable or activity that is restricted to specific user roles is not available on the **Related Docs** page in the project, unless it is also associated with a non-restricted deliverable or activity. Members of the project team (team members and project managers) can add and edit details for related documents. The assigned document owner, Process Manager with Manage Process rights, and members of the project team including the assigned project manager can add related documents to a deliverable or activity. Workflow action owners can add related documents to the deliverable or activity associated with their workflow action. Restricted Team Members can add, view, and edit only the related documents associated with their assignments.

Searching for Projects and Documents

In Accolade, there are two primary ways to search: Quick Search and the Recent Items Menu. Both are available from the Accolade title bar. To perform a more refined search, use Advanced Search (which is accessible Quick Search).

The Accolade search engine is a Full Text Search, and searches for text contained in text files, HTML files, Microsoft Office 2003 and earlier files, and text in online forms. Search requires third-party IFilters to search text contained in Microsoft Office 2007 and later documents, PDFs, email files, Microsoft Project files, and others. These IFilters are part of the installation process. See the *Accolade Installation Guide* or contact Sopheon Customer Support for more information.

Important! Images do not contain text so you cannot use search to find images attached to projects. If IFilters for PDFs are installed, Accolade search can only search text within PDFs, not images. If a document that contains text is scanned and saved as a PDF, the text is not searchable because scanning creates an image of the document.

Quick Search

Quick Search searches for both projects and published documents matching your search expression to project names, project IDs, project description, project manager's name, words and phrases of metric values in document titles and content.

When searching, you may enter words, phrases, partial words and phrases or operators to run more complex searches. Search is not case sensitive. Searching for **Project One** provides the same results as **project one**. You can also find projects by searching for a metric value. Enter the contents of a metric into Quick Search and any project containing that value is returned in the results. The search returns results for all projects in which you are a member of the project team or have access to through your access group assignments.

Quick Search only displays for users with roles with project access.

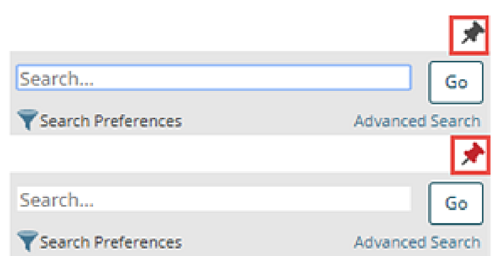
- Document Reviewer
- Executive
- Gate Manager
- Idea Manager
- Process Manager
- Resource Planner
- Search Only
- Project Team Leader
- Project Team Member

To search for a project or document:

1. Enter search text in the **Quick Search** field in the far right of the Accolade title bar and press **Enter**.

   To find all the projects in which you are a team member, all documents which you own, and all published documents to which you have access, leave the search field blank and press **Enter**.

   Search results are shown in a panel that slides in from the right side. Do any of the following to work with the Quick Search results:

   - **To dock the panel** - Click to dock the panel so it remains open.
   - **Access Project Manager or document owner details** - Click next to the project or document

in the search results to expand the details. From here, click to contact the Project Manager or document owner by email or via chat.

- **Display the project or document** - Click the name of the project or document in the search results.

To set Quick Search preferences:

1. With the Quick Search window open, click in the search results window.
2. Select the appropriate options to do the following:
   - **Search only for projects** - Clear the **Show documents** check box.
   - **Search for closed projects** - Select the **Include closed projects in project search** check box.
   - **Search for documents in closed projects** - Select the **Include closed projects in document search** check box. When the check box is cleared, the search results include documents in open and closed projects.
   - **Limit or increase the number or returned results** - In the **Show a Maximum of...** fields, enter the maximum number or projects and documents to include in the returned search results.
   - **Search within one or more project classes** - In the **Select Classes in Project Search** field, click a class name, or use **CTRL** + click to select several classes.
3. Click **Save**.

Advanced Search

Advanced Search enables you to filter the search to specify the part of the total results you want to see. Using Advanced Search, you can search for project or published documents at one time.

> Select to print the list of projects or documents found using Advanced Search.

To use advanced search to find projects and documents:

1. From the **Workspace** menu, select **Search** and select whether to search for project or documents.

   > You can also access Advanced Search directly from the Quick Search results window. Click **Advanced Search** and select the appropriate tab.

2. Do one of the following:
   - **To find all projects or documents to which you have access** - Leave all the fields in the **Search For** section blank and click **Search**.
   - **To search for one or more specific projects or documents** - Enter filtering information in one or more fields in the **Search For** section. When you enter filters, Search finds projects for which ALL of the filters are true meaning the filters are combined logically by AND, not by OR.

3. Click **Search**.

To search for a recently accessed project or document using Recent Items Menu:

1. Click from the Accolade title bar.
2. Locate the item you wish to view.

To favorite, unfavorite, or add a follow up flag to an item on the Recent Items Menu:

- **To favorite a project** - Click on the favorite icon to the left of the project name; the icon should go opaque
- **To unfavorite a project** - Click on the favorite icon to the left of the project name; the icon should return to the default outline
- **To add a follow up flag to deliverables and activities** - Click on the follow up flag icon to the left of the deliverable or activity; the icon should go opaque
- **To remove a follow up flag from deliverables and activities** - Click on the follow up flag icon to the left of the deliverable or activity; the icon should return to the default outline

Viewing Your Work

While you can view your work on individual projects, the Work pod allows you to view all of your work throughout Accolade in one, central location. The pod displays information as it relates to your work in a card format and allows you to take many actions without navigating to a different page. The Work pod can be found in a number of different places, including:

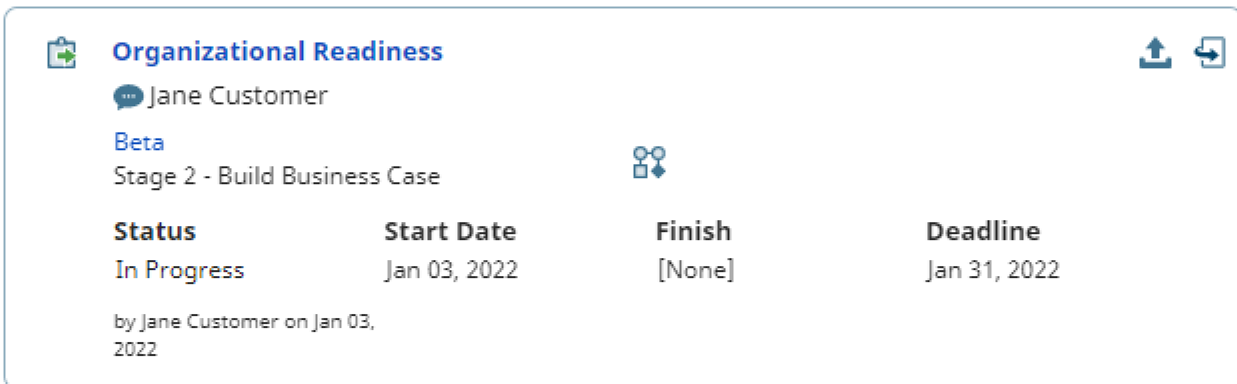
- The **All My Work** page, accessible from the **Workspace** menu. This page has two Work pods that are configured to display Projects where you are a team member, and Deliverables and Activities that are assigned to you.
- The **Upcoming Gates** pages, accessible from the **Workspace** menu. The pod on this page is configured to display gates in projects you are a part of so you can see upcoming gate meeting dates and related details. This is accessible to users with the Gate Manager, Executive, or Process Manager roles.
- The **Comprehensive** and **Focused** home page layouts.
- The Work pod can also configured to display on a project page by an Administrator or Process Designer where it will only display information related to that project.

Depending on your system configuration, the location of the Work pod may vary. The pages listed above can be renamed or may not exist.

Regardless of where it's accessed from, you are able to control the data the pod displays. To do this, click at the top right corner of the Work pod to open the **Content Settings** dialog and change the value in the **View** field. To show only your work, check the **Show only my work** box. You can also filter and sort the cards to display the most pertinent information. The options available depend on the type of work displayed.

The available **View** options include:

Deliverables and Activities



When *Deliverables and Activities* is selected, the cards in the pod represent deliverables and activities assigned to you.

- Click anywhere on the card to flip it over to show **Status Notes**. Select the field to edit the status notes and click out of the field to apply the changes. Click the card again to flip it back over.
- Click inside any of the fields on the card to update the value.
- Click the name of the deliverable or activity to open a dialog box with more details.
- If available, click to open and edit the associated quick grid.
- If the deliverable or activity is part of a workflow, click to view the workflow where it can be started or stopped. Workflows in progress display on the card.
- Click to upload a new version of the deliverable or activity, upload a new version and publish, or to upload a new related document. Click to download the template or the latest version of the document if available.

Document reviewers can click to approve a document or to skip a document. After selecting an option, the document reviewer is prompted to enter a decision.

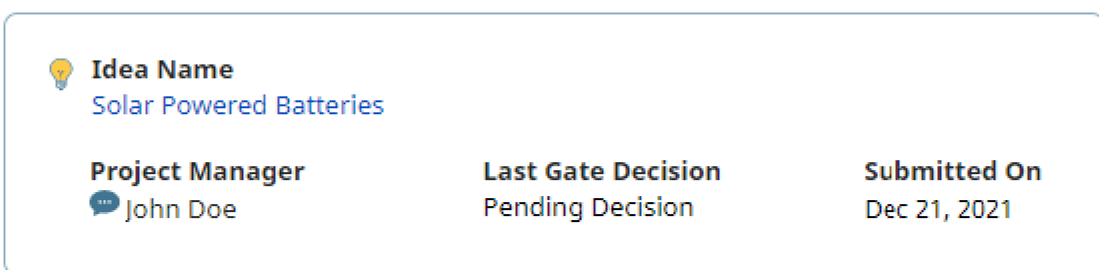
Gates

Gates only displays information for users with the Gate Manager, Executive, or Process Manager roles.

When *Gates* is selected, the cards in the pod represent gates throughout projects you are a part of so you can see upcoming gate meeting dates and related details.

- Click anywhere on the card to flip it over to show filter metrics. Click the card again to flip it back over.
- Click the **Project Name**, **Next Gate**, or **Current Stage** to open the related project page.
- If available, hover your mouse over the **Ready** icon to check the status of related deliverables and activities associated with the next gate.

Ideas



When *Ideas* is selected, the cards in the pod represent ideas that you have submitted. The cards that display are read only.

- Click the idea name to open the related project.
- To send an idea to the Project Manager, click next to the Project Manager and select **Email** to open your default email client.

- The email includes the name of your idea and a link to view the project, and can be edited before sending.

Projects

When *Projects* is selected, the cards in the pod represent projects where you are listed as a project team member.

- Click the name of the project to open the project home page. Click the name of the next gate to open the related project page.
- The front of the card displays any configured filter metrics.
- Click anywhere on the card to flip it over to show **All Deliverables to Next Gate**. Click the card again to flip it back over.
- Click to mark a project as a favorite. Marking projects as favorites is done on a user-by-user basis and allows you to sort and filter projects in the Work pod based off of your personal favorites.
- If you have *Allow updates from Work Pod* rights, an upload and download icon appear at the top above the cards:
  - Click to upload project information to update multiple projects at once.
  - Click to download project information for the displayed cards to a workbook file.

Notes:

- If your home page is set to **All My Work** or **Upcoming Gates** and the page is removed from your system by an administrator, your home page will default to **My Profile**.
- The **All My Work** and **Upcoming Gates** pages will always display at the top of the **Workspace > My Workspace** menu even if the order is updated by an administrator.

Viewing Your Projects

Use the Work pod, available on the **All My Work** page, to access and review projects in which you are part of the project team. The Work pod provides a single place where you can see details for the projects in which you participate, including status reports, metric values, upcoming gate information, and the status of project deliverables.

> The steps in this article cover using the Work pod on the **All My Work** page to view this information. Depending on your company's configuration, you may not have access to this menu or it may be renamed. The Work pod is also available on the **Comprehensive** and **Focused** home page layouts, and on the **Upcoming Gates** page. For more information, see "Viewing Your Work" on page 16.

To view your projects:

1. From the **Workspace** menu, click **All My Work**.
2. Click at the top right corner of the Work pod to open the Content Settings dialog.
3. In the *View* drop-down, ensure **Projects** is selected.

   If desired, set filter and sort options to control the projects that display.
4. Click **Apply**.

   For more information on the Work pod, see "Viewing Your Work" on page 16.

Viewing Your Assignments

Use the All My Work page to review the status of, and access, deliverables, activities, workflow action reviews, or Microsoft Project tasks assigned to you across all your projects. All My Work provides a single place where you can see and provide general updates to your project assignments including status, status notes, start date, finish date, and deadline.

The Work pod on the right side of the All My Work page includes assignments from both current and future stages, and workflow actions and deliverables, in a workflow if the workflow is currently in progress. Items in the current stage are removed from the Work pod when the next gate meeting decision is set to **Go** (and the project moves to the next stage). All items from a project are removed if the project is closed.

To view your assignments:

1. From the **Workspace** menu, select **All My Work**.

   Your current assignments display on the right side of the screen in the Work pod, based on any filters set if you have customized the page.

   - Deliverables that you own that are currently not started.

   - Deliverables that you own that in process.

   - Deliverables that you own that are flagged as in trouble, as they are nearing or have passed their due date.

   - Deliverables assigned to you that are not required.

   - Deliverables that you own that are in a workflow that is currently in progress.

   - Deliverable workflow actions that you own that are started. Applicable only if you use Collaborative Workflow.

   - Activities that you own. Similar icons for activities that are in progress, in trouble, and not required display for activities as deliverables.

   - Tasks from an Microsoft Project plan that you own. Tasks may not map directly to a deliverable or activity within the project, but are to be completed as part of the work in the project. These types of tasks are only applicable if you use Accolade's integration with Microsoft Project.

   To sort and filter the data that displays, click at the top of the Work pod. From here, you can add multiple filtering and sorting options. For more information, see "Viewing Your Work" on page 16.

2. Do one of the following.

- **To filter the returned results** - If you have a large number of assignments and need to see a more refined list, click and define the criteria an assignment must meet to be included in the list.
- **To display an assignment** - Click the deliverable, activity, or task's name to display its details within the project.
- **To display project information** - Click the project's name to display the project's initial page, the project's stage to display the current stage deliverables and activities, or the project's gate to display the current stage gate page.
- **To access a quick grid** - If displayed, click to display the quick grid's details within the project.
- **To download a template or document version** - If displayed, click the icon to view the template or document version available for download. Click the (or similar icon) to download the desired file.

To update status notes:

1. From the **Workspace** menu, select **All My Work**.
2. For the deliverable or activity that you want to update, click the card to flip it over.
3. Enter the updated information in the **Status Notes** field and click out of the field to apply the changes.

   The deliverable and activity notes are saved on the All My Work page and in the details of the deliverable or activity.

Working on Deliverables, Activities, and Tasks in Projects

Each stage of a project contains one or more deliverables for that particular stage of development. Project team members complete these documents or physical deliverables and executives making process decisions review them to determine if a project continues to move forward.

- **Deliverable** - A deliverable is a document or other item that is produced for a gate meeting. Its purpose is to help gatekeepers decide whether to continue or discontinue a project. Deliverables can be physical items such as a prototype; however, they are represented in Accolade as documents or as quick grids (or a combination) where document owners can enter information. In addition, a deliverable can have additional reference information attached to it in the form of related documents.
- **Activity** - An activity is anything that helps to complete, or is part of, a deliverable. For example, the completion of a document that contains research for a deliverable, a sub-document to the deliverable itself that is presented at a gate meeting, or one or a series of tasks that support the completion of the deliverable.

Deliverables and activities can be any of the following types, or a combination:

- File documents, such as documents, spreadsheets, and presentation files.
- Online forms that are completed directly within Accolade.
- Details in the form of quick grids for updating metrics (data gathering points) assigned to the project.
- External documents or web pages.

The various components of a single deliverable or activity are available in the Deliverable/Activity Details, accessible when you click the document's name from anywhere within Accolade. The details provide access to set document dates, assign workflows, enter information in the form of quick grids and extended fields, view dependency information, attach related documents, update the document status and enter status notes, and to access and upload document versions. The information you enter in deliverables and activities updates metrics and values throughout the project.

Deliverables and activities are assigned owners and completed before their required deadlines. Deliverables and activities are editable by those with edit rights in any stage unless the stage is locked or the project is closed.

Collaborating with Team Members

Accolade contains several methods to communicate with other users directly from the application. Depending on where you are in the application, you can communicate with individual or multiple team members, gate keepers, deliverable owners, the project manager, or a combination of people on a project.

Accolade offers the following communication options:

- **Emails** - As you are completing project details and reviewing projects within Accolade, send emails directly from the application to members of the project. Direct emails can be helpful if you are reviewing a document's details and have questions for the document owner.
- **Chats** - Start a chat directly from Accolade to collaborate and discuss aspects of a project or document with Microsoft Teams and Slack.
- **Calls** - Start a call directly from Accolade to quickly communicate with team members with Microsoft Teams.
- **Schedule meetings** - Schedule meetings with team members about project related topics with Microsoft Teams.
- **Connect to MS Teams** - Connect an Accolade project to a Microsoft Teams channel, allowing team members to go to, post in, or email members of the connected Microsoft Teams channel directly from Accolade.
- **Discussions** - Use discussions for extended conversations on a variety of topics. Each discussion is a collection of messages. Users with access to the project can enter a discussion and add a message to the thread, allowing other users to respond. The thread of messages also serves as a record of the opinions and information shared during the discussion.

  Users can create and contribute to discussions about a specific project on the project's Discussions page, or can participate in discussions about any project that you are a member of through the Innovation Feed page available from the **Workspace** menu. Discussions may also be available on custom project pages.

In addition, a project may contain one or more deliverables or activities that require more than one team member's expertise to complete. Project Managers can make these types of documents collaborative, and multiple team members can participate in completing the document.

Connecting an Accolade Project to Microsoft Teams

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.

You can connect a Accolade project with a Microsoft Teams channel, allowing team members to go to, post in, and email members of the connected Microsoft Teams channel.

Note: The option to connect to a Microsoft Teams channel is only available to Project Managers, Process Managers with Manage Process rights for the access group of a project's main data, or a team member who has extended rights for a project.

To connect an Accolade project to a Microsoft Teams channel:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Connect Accolade Project to Teams Channel**.
3. Click on **Select a channel**. The teams available to you are listed from Microsoft Teams.
4. Select a team. The channels in the selected team are listed; select the channel you want.
5. Click on **Connect**.

   Once successfully connected, the communication menu icon changes to one with a green dot , and the name of the selected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To create a new Microsoft Teams team and connect it to an Accolade project:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Create Team & Connect**.

   Note: To do this, you must have rights on Microsoft Teams to create a team.

3. In the **Create a Team** dialogue:
   - Enter a team name.
   - If this team is to be private, click on the **Private Team** check-box, else your team is public.
   - Ensure the **Copy team members into new team** check-box is ticked, to copy Accolade project team members into the new Microsoft Teams team. Accolade team members with email addresses matching Microsoft Teams users will be added as members of the new Microsoft Teams team.
   - Select the Accolade layouts you require for your team. These will appear as Microsoft Teams tabs on your new team.

4. Click on **Create Team**.

   Microsoft Teams opens, displaying your newly created team with a link back to the connected Accolade project. In Accolade, once successfully connected, the communication menu icon changes to one with a green dot , and the name of the connected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To create a new Microsoft Teams channel and connect it to an Accolade project:

1. In an Accolade project, click next to the in the upper right corner of the page.
2. Click on **Create Channel & Connect**.

   Note: To do this, you must have rights on Microsoft Teams to create a channel.

3. In the **Create Channel** dialogue:
   - Select a team from the drop-down.
   - Enter a channel name.
   - Specify the channel's visibility type from the drop-down.
   - Select the Accolade layouts you require in your channel. These will appear as Microsoft Teams tabs on your new channel.
4. Click on **Create Channel**.

   Microsoft Teams opens, displaying your newly created channel with a link back to the connected Accolade project. In Accolade, once successfully connected, the communication menu icon changes to one with a green dot , and the name of the connected Microsoft Teams team and channel is displayed, along with the options to **Go to Channel**, **Post in Channel**, **Email Channel**, **Schedule Meeting with Channel**, **Change Channel**, and **Disconnect Channel**.

   Note: The options to change and disconnect a channel are only available to Project Managers or Process Managers with the relevant edit or access rights. Team members without these rights will only see the options to **Go to Channel**, **Post in Channel**, **Email Channel**, and **Schedule Meeting with Channel**.

To switch the Microsoft Teams channel connected to an Accolade project:

1. In an Accolade project that is connected to a Microsoft Teams channel, click next to the in the upper right corner of the page.
2. Click on **Change Channel**.
3. Click on the team and channel name. The Microsoft Teams teams available to you are listed.
4. Select a team. The channels in the selected team are listed; select the channel you want.
5. Click on **Connect**.

To disconnect a Microsoft Teams channel from an Accolade project:

1. In an Accolade project that is connected to a Microsoft Teams channel, click next to the in the upper right corner of the page.
2. Click on **Disconnect Channel**.
3. In the dialog that opens, click **OK**.

Sending Email Directly from Accolade

As you are completing project details and reviewing projects within Accolade, you can send an email directly from the application to members of the project team including team members, the project manager, gatekeepers, gate owners, and deliverable and activity owners.

You can send an email that contains links to access projects or documents within Accolade. Only Accolade users who have access to the project can follow the link to open the project.

To send an email to a team member directly from Accolade:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Email.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   An email opens in your default email program with the user's specified email populated in the **To** field.
4. Complete the email details and send the email.

To send an email to a project team member directly from Accolade from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to email and click Email.

3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   An email opens in your default email program with the user's specified email populated in the **To** field.

4. Complete the email details and send the email.

To send an email to members of a Microsoft Teams channel directly from Accolade:

> **Note:** This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Email Channel**.

   An email opens in your default email program with a link to the project in the email body.
3. Complete the email details and send the email.

> **Note:** Before you are able to send an email to a channel, if you do not have an email address connected to Microsoft Teams, you must generate one from the Teams app. To do this, in the Microsoft Teams interface, select **Get email address**.

To send a link to an Accolade project:

> **Note:** Only users with access to projects can send a link using the method described below.

1. Display the project to which you want to send a link.
2. Click in the project's header and select one of the following options:
   - **Copy** - Displays a link to the project that you can copy and paste into any document, including email.
   - **Email** - Opens an email in your default email program with a link to the project in the email body. Complete the email details and send the email.

   Copied or emailed links will direct the recipient to the specific project page the sender was on when sharing the link.

To send a link to an Accolade document:

1. Display the project that contains the document to which you want and select the stage or gate that contains the document.
2. Click the name of the document to display its details.

   You can also display the details of the document by clicking a document link from pages such as All My Work.

3. Do one of the following:
   - **For gate documents** - Click in the **Name** field.
   - **For deliverable and activity documents** - Click in the upper right of the Deliverable or Activity details dialog box.

   An email opens in your default email program with a link to the project in the email body.
4. Complete the email details and send the email.

Notes:

- If an email icon is disabled and you think the person should have a usable email address, contact your Accolade Administrator.

Starting Chats

You can start a chat in Accolade from any project page with Microsoft Teams or Slack depending on the collaboration tool your organization uses. You can chat with one team member, all team members or team members in any project team; however, Slack is limited to chatting with six.

Note: Users must have an email address defined in their user profile to participate in chats. All users included in the chat must be setup to use the same chat collaboration tool. See your Accolade Administrator for set up.

To start a chat with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Chat.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams or Slack opens (depending on the collaboration tool your organization uses) and allows you to start a chat.

To start a chat with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Chat.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams or Slack opens (depending on the collaboration tool your organization uses) and allows you to start a chat.

Note: If you've reached the character limit for project team members, you can uncheck a name.

To start a chat in a Microsoft Teams channel from an Accolade project:

Note: This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Post in Channel**.

   Microsoft Teams opens in the connected channel with a link to the project in the message body, allowing you to start a conversation with the members of the Microsoft Teams channel.

Starting Calls

You can start a call in Accolade from any project page with Microsoft Teams. You can call one team member, all team members or select team members.

Note: Users must have an email address defined in their user profile to participate. All users included in the call must be setup to use the same collaboration tool. See your Accolade Administrator for set up.

To start a call with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Call.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to call and click **OK**.

   Microsoft Teams opens and allows you to start the call.

To start a call with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Call.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to call and click **OK**.

   Microsoft Teams opens and allows you to start the call.

Note: If you've reached the character limit for project team members, you can uncheck a name.

Scheduling Meetings

You can schedule a meeting in Accolade from any project page with Microsoft Teams. You can schedule meetings with one team member, all team members or select team members.

> **Note:** Users must have an email address defined in their user profile to participate. All users included in the meeting must be setup to use the same collaboration tool. See your Accolade Administrator for set up.

To schedule a meeting with any team member from a project page:

1. In any Accolade project, click next to the in the upper right corner of the page.
2. Click Schedule Meeting.
3. The names of the Accolade team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams opens and allows you to schedule a meeting.

To schedule a meeting with a project team member from the Team pages in a project:

1. In any Accolade project, click to access the project team.
2. Click next to the project team you want to chat with and click Schedule Meeting.
3. The names of the Accolade project team members are checked by default. Uncheck the names of those you do not want to chat with and click **OK**.

   Microsoft Teams opens and allows you to schedule a meeting.

> **Note:** If you've reached the character limit for project team members, you can uncheck a name.

To schedule a meeting with a Microsoft Teams channel from a project:

> **Note:** This option is only available on projects that are connected to a Microsoft Teams channel.

1. In the Accolade project, click next to the in the upper right corner of the page.
2. Under the name of the Microsoft Teams channel, click on **Schedule Meeting with Channel**.

   Microsoft Teams opens in the connected channel and allows you to schedule a meeting with the members of the Microsoft Teams channel.

Participating in Project Discussions

Discussions allow team members to collaborate and communicate about projects directly in Accolade. Each discussion is a collection of messages and can be accessed from the project itself or through the **Innovation Feed** available on the **Workspace** menu. Your defined user role may determine how you access project discussions.

Only team members assigned to a project have access to view and participate in project discussions. Restricted Team Members cannot access the discussions for their projects.

Viewing Project Discussions

Project discussions are viewable from the following locations:

- **Innovation Feed** - Available from the **Project > Innovation Feed** menu, use the Innovation Feed to review and participate in discussions from more than one project. Only the three most recent comments in each discussion are displayed by default. To see all the comments in a discussion, click the row containing **View (number) more comment(s)**.
- **Discussion page within a project** - Click the **Discussions** page within a project to review discussions about only that project.
- **Custom pages within a project** - If defined, discussions may also be available within a custom page within a project. Click the custom page icon.

Click to refresh the discussions and ensure you are viewing the most up to date comments for discussions in either location.

Creating Project Discussions and Adding Comments

On the Innovation Feed page, you can create and view discussions in any project shown on your All My Work or Upcoming Gates page that you have rights to create discussions in. Any user who can access the Discussions page in a project can create discussions in that project.

To create a project discussion:

1. From the **Workspace** menu, select **Innovation Feed** to display all your project discussions, or display a project and select the **Discussions** page.
2. Click to create a new discussion.
3. If creating a discussion from the Innovation Feed, select the project to which the discussion applies from the **Project** field.
4. In the **Title** field, enter a title that clearly identifies the subject of the discussion.
5. In the **Message** field, enter any initial comments regarding the discussion to get the conversation going.
6. Click **Create** to add the discussion and your initial comment.

   Other project team members can now view the discussion.

To add comments to an existing discussion:

1. From the **Workspace** menu, select **Innovation Feed** to display all your project discussions, or display a project and select the **Discussions** page.
2. In the **Write a Comment** field, enter your comments to add to the discussion.
3. Click **Send**.

Notes:

- To delete a discussion that you created or a comment that you added to a discussion (if you sent the comment and if it is the most recent comment in the discussion), display the discussion and click next to the title to delete the discussion, or next to the comment to delete the comment.

Chapter 2

Configuring Your Workspace

How you use Accolade, and how the person sitting next to you uses Accolade, may differ greatly based on your user role, the information you need to see, and your primary language or geographic location. Accolade provides the ability to change aspects of your user profile and to configure several pages to configure the application to work best for you.

> **Note:** Administrators can also use your user profile to review your current setup to troubleshoot access issues with Accolade.

To access your user profile, click your user icon in the top right corner of the page, and click **My Profile**. Your user profile displays details about your account and is the place that you can review or update the following on the **Details** tab:

In the User Details section, you can update:

- Your profile image that displays with your user name in various locations in Accolade.
- The email address used for Accolade notifications and the chat address used for chat.
- The selected landing page when you first open Accolade.
- Whether Quick Search returns projects with similar names and descriptions as you create projects.
- The language in which the application displays.
- The format in which to enter and display dates. For example, MM/dd/yyyy or dd/MM/yyyy.
- The date your user account expires, if your company has user expiration policies in place.
- Your file download preferences for the Microsoft 365 integration, if enabled.

In the Delegate Assignments section, you can update:

- Who your assignments or timesheet approvals are delegated to, and the starting and ending dates for the delegation time period.

In the User Roles and Rights section, you can view:

- The user roles you are assigned. User roles determine what you have access to do within Accolade. See the User Roles Reference online Help topic for a list of the major responsibilities of each role.
- All access groups you are a member of.
- The rights you have been assigned for reporting and project updates.

In the User Links section, you can update:

- Any menus that display specifically for you.

Note: The system notifications and reports you receive by email can also be updated on the **My Profile** page, on the **Email Notifications** and **HTML Reports** tabs respectively.

In addition to changes in your user profile, you can also do the following to configure the Accolade workspace to better fit your needs:

- Configure or filter the content displayed on certain pages.

Updating Your User Profile Image

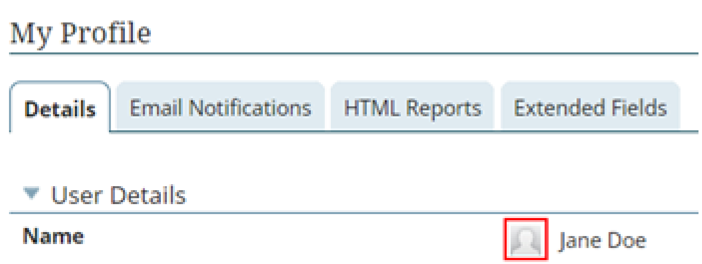
Add an image that displays along with your user name in various locations within Accolade. A default image displays until you upload a picture.

Administrators can add an image for you within your Accolade user account. You can modify or remove the image specified for you. Administrators can also modify the image that you add.

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.

To add or update your user image:

1. Access your user profile and select the **Details**



tab.

2. In the **Name** field, click the image to the left of your name.

   If no image is set for your profile, displays.

3. Click **Choose Image** and select the image to add.
4. Click **Upload File** to upload the file to your profile.
5. Click **Apply** to save your changes.

Notes:

- To remove a profile image, click the image next to your name in your user profile and click **Remove**.
- The **Enable User Profile Images** system parameter must be enabled to add an image to your user profile.

Defining Your Home Page

When you log in to Accolade for the first time, you have the option to select a Home page layout that displays pods with information that is relevant to you, and can be further personalized through the pod settings. This page will display every time you log in to Accolade, or can be returned to at any time by clicking the Accolade logo in the left corner of the title bar.

The Focused home page layout is intended to help the user focus, by showing current assignments and some relevant links for navigation, and includes two pods:

- a Quick Links pod, which displays a list of frequently used hyperlinks to Accolade projects and global links, as well as other websites.
- a Work pod, which can be configured to display deliverables and activities, gates, ideas, project work, or workflows across all projects in Accolade. For more information, see "Viewing Your Work" on page 16.

  Users can update the deliverable status and dates directly within the Work pod by clicking on the field and selecting the appropriate information. Changes are automatically applied, but the home page must be refreshed for changes to display in the Calendar pod.

The Comprehensive home page layout is intended to help the user see the bigger picture, and includes three additional pods:

- a To-Do list pod, where you can create a personalized worklist by adding tasks and due dates, and checking items off as they are completed.
- a Calendar pod, to visually display important dates such as start and end dates for deliverables and activities, deadline dates for workflows, and project gate dates.

- a Countdown pod, where you can display a countdown of days until the occurrence of an important date or event of your choosing.

  Users can personalize the content of Quick Links, Work, and Countdown pods by clicking in the top right corner of the pod to edit the individual pod settings on their layouts.

To change to a different home page layout:

1. Access your user profile and select the **Details** tab.
2. In the Home Page Layout field, click to open the layout selection dialog. Select the layout option you want to use, and click **Select** to apply your changes.

Selecting Other Pages as a Home Page

Users also have the option to select a different page within Accolade to display when they log in. For example, a Project Manager could select a specific project page as their home page, or a team member could select the Deliverable page of a current deliverable as their home page.

To set the Home page to a different Accolade page:

1. Navigate to the page you want to display as your Home page.
2. Click your user icon in the top right corner of the page and click **Set as Home**.

   This selection will set the page currently displayed as your Home page. To change to a home page layout or to a different page in Accolade, repeat the appropriate process above.

Notes:

- To revert to a previously selected home page that is custom to your company, access your user profile and select the **Details** tab. In the Previous Home Pages field, select the page you wish to set as your home page and click **Apply** to save your changes.
- Selections in the Quick Links pod will display in alphabetical order within the appropriate category. Project links are displayed first, followed by global links, and custom user-added links will display last.
- Administrators and Process Designers with the Template Access role can make changes to home page layouts on a global level through the layout and pod configuration, for example, to add company landing page hyperlinks to the Quick Links pod for all users, or to add additional information at a company level.
- If your home page is set to **All My Work** or **Upcoming Gates** and the page is removed from your system by an administrator, your home page will default to **My Profile**.

- The **All My Work** and **Upcoming Gates** pages will always display at the top of the **Workspace > My Workspace** menu even if the order is updated by an administrator.

Changing the Display Language and Date Format

Your company may do business in more than one country, or you may speak another language that you prefer to have the Accolade site display in. Select your preferred language and date format in your user profile to display the text in that language, and to display and enter dates in Accolade within that format.

To change the display language:

1. Access your user profile and select the **Details** tab.
2. In the **Language** field, select the display language.
3. Click **Apply** to save your changes.

To change the date format:

1. Access your user profile and select the **Details** tab.
2. In the **Date Format** field, select the format to display and enter dates.

   The default date format is MMM dd, yyyy (Feb 28, 2016).
3. Click **Apply** to save your changes.

Notes:

- The **Language** list contains English (the default) and any additional languages defined within Accolade.
- If using the default date format, when selecting dates in date fields throughout the application, you select a date from a calendar. Typing the date, such as Feb 28, 2015, is not allowed.
- The language setting in Accolade determines the character used as the decimal point in larger numbers and the group separator.

Adding Your Own 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 that is available to only you when you log in.

Administrators can define links for specific users within each user account. You can modify or remove the links specified for you, or add to the list of links for a total of 5 links. Administrators can also modify the links that you add.

To add your own menu items:

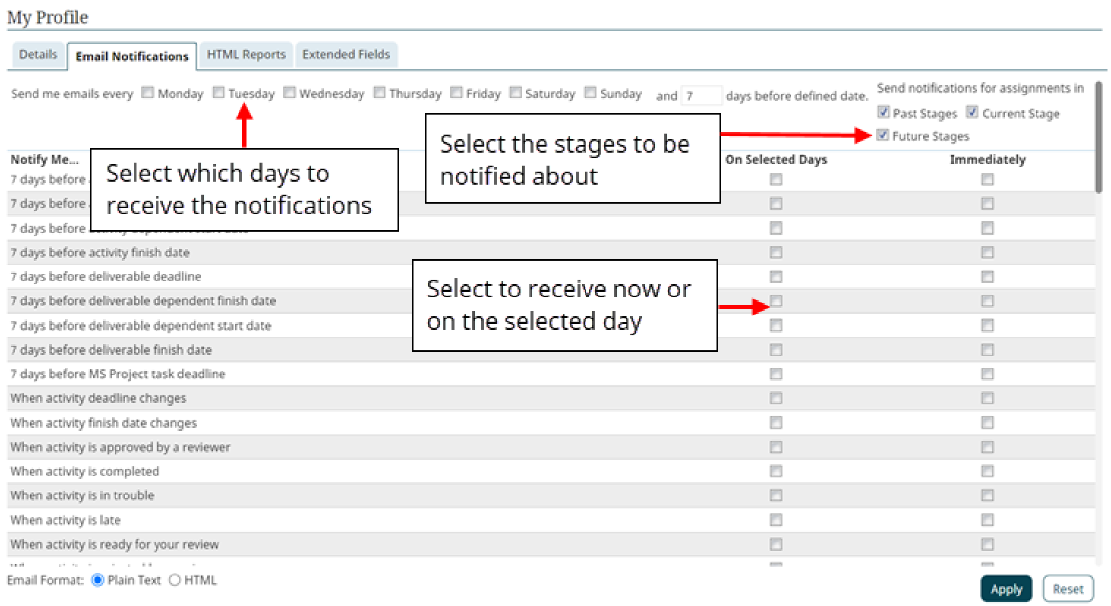
1. Access your user profile and select the **Details** tab.
2. In the **User Links** section, in the **Caption** column, enter the text of the menu, up to 64 characters long.
3. From the **Link** field, select the link type to create:
   - **http** - A URL to a Web page.
   - **https** - A URL to a secure Web page.
   - **ftp** - A link to an FTP download site.
   - **file** - A link to a file or executable on your company's intranet.
   - **mailto** - Opens the default email application and displays a blank email addressed to this email address.
   - **callto** - Opens the default chat and collaboration tool, which invites the person at the address you define to a chat.
4. 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.
5. Click **Apply** to save your changes.

Subscribing to Notifications

The Accolade Administrator defines a set of email notifications appropriate for your user role and job position. Accolade sends notifications when project events occur, such as activity and deliverable deadlines and gate decision approvals. Notifications can be helpful reminders about events happening with projects in Accolade. You can change the notifications you receive, and the frequency in which they are sent through your user profile.

Notifications are not distributed to all users. Notifications of most events are only sent to members of the project in which the event occurred.



To subscribe to a notification:

1. Access your user profile and select the **Email Notifications** tab.
2. Do one of the following to select when to receive notifications:
   - **To receive scheduled emails** - Select one or more days of the week in the **Send me emails every** field and one or more events in the **On Selected Days** column. Emails are sent at midnight before the selected days regarding the selected events. To receive a weekly notification, select one day of the week.
   - **To receive immediate notifications** - Select one or more check boxes in the **Immediately** column.
3. To limit the stages in which you receive assignment notifications, select one or more stage selections in the **Send notifications for assignments in** field.

   For example, if you only want to receive notifications for assignments in the current stage of your project, select **Current Stage**, and ensure the **Past Stages** and **Future Stages** options are cleared. All three are selected by default.

4. At the bottom of the notifications list, in the **Email Format** field, select whether to receive emails in plain text or HTML format.
5. Click **Apply** 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.
- If no events of the selected type have occurred since the last status report, an email is still sent indicating that no events have occurred.
- Emails to users assigned the Restricted Team Members user role *do not* contain project links that emails to other roles contain, due to Restricted Team Members project access.
- For change of ownership events such as **Deliverable Owner Changes** and **Project Manager Changes**, the new owner receives a notification (if subscribed) while the old owner does not.

Subscribing to Reports

Note: Administrators and Process Designers assign user roles to reports as they add them to Accolade. Only user roles assigned to a specific report can subscribe to receive that report by email.

An HTML report displays product data on the **Charts & Reports** page or within a project. In addition, you can select to receive HTML reports via email. The email contains the full content of the report, and you can select how often you would like to receive each report on a report-by-report basis. If a report fails to run, you receive a failure notification if you are subscribed to the report.

Important! HTML reports can range in size. To receive emails with larger reports, ensure your company's email server accommodates the file size required. You may be able to preview a report within Accolade but not receive it by email if the email server blocks the emails due to its size.

To set up an email schedule for a report:

1. Access your user profile and select the **HTML Reports** tab.

   The reports that you have access to display.
2. For each report that you want to receive in email, select the days of the week on which you want to receive that report.

   For example, if you want to receive a report every Monday morning, select the check box in the Monday column for that report. To receive all the listed reports on a particular day, select the check box at the top of the day column. For example, to receive all reports in the list on Monday, select the check box at the top of the Monday column.

Reports listed with an asterisk (*) are set to required. You cannot modify the selections for these reports.

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

To send a report immediately:

1. Access your user profile and select the **HTML Reports** tab.

   The reports that you have access to display.

2. Select the **Send Now** check box next to the reports you want to send.

   To select all reports, select the **Send Now** check box at the top of the **Send Now** column.

3. Do one of the following:

   - **To send the selected reports to yourself** - Click **Send**.
   - **To send the selected reports to others** - Click **Share**, select the users you want to send the report to, and click **OK**. Accolade sends a copy of the report to you and the selected users, *with the same data that displays to you*. If there is sensitive data in the report, take caution in sending it to others.

   You can also share an HTML report with users while viewing the report through the **Charts & Reports** page.

Notes:

- If a report contains no data, or contains data that you are not authorized to view, Accolade does not send the report.
- Accolade sends a separate email for each report.
- HTML reports viewable in Lotus Notes are not supported.

Configuring Pages

Several pages, including All My Work, Upcoming Gates, Project Stages, Project History, and Resource Editor, provide configuration options to set the page to display only what you want or need to see.

Within Accolade pages, look for the following icons to configure the page contents. Customization settings are unique to each user who accesses the page. Your preferences are saved for only your user.

- - Print documents, lists, and reports you have access to. This option is only available on some pages.

-  - Filter the display based on selected filter options specific to the page.
-  - Select the columns to show or hide. In some tables, you can also drag-and-drop columns into your preferred display order.
-  - Select the rows to show and hide.
-  - Save the current view configuration to display as your default view for the page.
-  - Select how to group items. This option applies only to the Resource Editor.

Changing Your Password

If Sopheon hosts your Accolade instance, you have access to change the password you use to access Accolade. If your company hosts the Accolade server, work with your system administrator about how and when to change your password, and the password requirements for your company.

To change your password on a hosted site:

1. Access your user profile and select the **Details** tab.
2. In the **Change My Password** field, enter your current password and your new password, respectively.
3. Click **Apply** to save your changes.

Sopheon Corporation

6870 West 52nd Avenue, Suite 215

Arvada, CO 80002