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# Sopheon Accolade®

## Process Design - Importing Configuration Training Guide

Version: 17.0



## About Sopheon Accolade®

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# 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
<i>Sopheon Accolade What's New in This Release</i>	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.
<i>Sopheon Accolade Administrator's Guide</i>	Provides information for administrative professionals regarding Accolade setup. This information is also provided in the online Help.
<i>Sopheon Accolade Installation Guide</i>	Provides information about the installation of the application and its required databases.
<i>Dashboards for Accolade Installation Guide</i>	Provides installation information for installing the Dashboards for Accolade component.
Quick Reference Cards	A PDF that can be printed double-sided that provides quick tips and navigation information for using Accolade.

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

## Prerequisites for Using this Module

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

### Accolade User Roles

- Process Designer
- Project Importer
- Reference Table Manager

### Terms and Concepts

- Reference Tables

### Related Training Modules

- Reference Table Design
- Process Design Overview

# Importing and Exporting Configuration Components Overview

Accolade provides Administrators and Process Designers the ability to transport configuration components between environments by exporting and importing via spreadsheets.

Process design and system configuration components can be downloaded from one Accolade environment and then uploaded into a different Accolade environment, and some mass configuration changes can be made using these processes.

## Importing and Exporting Configuration Components Best Practices

Keep the following set of best practice recommendations in mind when importing and exporting configuration components:

- If you have spreadsheets that were downloaded from a previous release, Sopheon recommends completing a download after upgrading to the latest release, to ensure your spreadsheet contains any new configuration settings added to the release.
- Using the import and export tools to update or remove configuration within the same environment can result in errors or unintended changes if information is missing in the import or an error occurs during the process.

The following guidelines are recommended when creating or updating files for import:

- Apply available Accolade filters to limit the export to the information for the components you wish to change.
- Include all file worksheets in the file to be uploaded.
- The columns in the spreadsheets must be in the same order for changes to upload successfully. All columns must be present, however the value in a column can be blank if appropriate.
- When uploading changes to component configuration, such as changes to quick grids or layouts, the existing configuration will be replaced with the imported version in the workbook. If existing components, such as a pod within a layout or an individual grid within a quick grid, are not included in the file, they will be removed.

Sopheon recommends creating a backup version of the original file prior to making any changes.

- Component system names cannot be changed using the export/import functionality. Although not recommended, component system names can be changed in the user interface, as necessary.
- Be mindful when changing Process Model configuration through the Import Process Models functionality. For example, if you are changing the number of stages or gates on an inactive

process model, this change should be made in the Process Model definition page, or the current model should be obsoleted and a new model created. The Import tool will prompt an error message and will not accept the change if not allowed. Additionally, if the configuration changes are significant or will impact a large number of existing projects, you may experience additional system impacts.

- The user performing the new configuration imports should have the highest configuration access group required by the components being loaded. This will minimize the conflicts associated with configuration access group errors related to the user's access levels and will reduce the chances of an incomplete upload.
- If you are transporting new configuration between environments, for example from a test environment to a production environment, components should be loaded in a sequence in order to increase efficiency and minimize load errors. Independent components should be loaded into the Accolade environment first, followed by dependent components, and complex components should be loaded last.

Sopheon recommends the following order when importing components:

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**Important!** The steps below are the steps to move a full configuration from one system to another. The order of these steps may vary depending on what is being moved or changed, and the existing configuration in the destination environment. For complex deployments or configuration changes, please contact Sopheon Customer Support prior to starting, to ensure that you protect the integrity of the data and don't inadvertently cause problems.

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Configuration Item	Dependencies*	Notes
<b>Independent Components</b>		
<b>Parameters</b>	None	These should generally only be changed for an initial deployment.
<b>Access Groups</b>	None	
<b>Security Lists</b>	None	Sopheon recommends using the reference table setup method for new security lists.
<b>Users</b>	None	Note that if the User import references new functions or functional areas that have not been created, they will cause errors when loading. The User importer will need to be reloaded after the functions and functional areas are imported.



Configuration Item	Dependencies*	Notes
		Additionally, if your company uses Resource Planning and the User importer references new resource pools that have not been created, they will cause errors when loading. This can be corrected when running the <a href="#">Resource Pool</a> and <a href="#">Resource</a> importers after the configuration import process is complete.
<b>Reference Tables</b>	None	Note that the Reference Table importer does not import the reference table data, only the table configuration, so the table version must also be manually uploaded at this time.
<b>Queries</b>	None	
<b>Classes</b>	None	If any new classes have the <b>Create Model in Planning</b> defined as <b>Yes</b> , change these fields to <b>No</b> prior to upload in order to prevent errors.  To apply this setting after the initial upload, these fields will need to be changed back to <b>Yes</b> on the workbook, and the workbook will need to be reloaded after the process models are imported.
<b>Dependent Components</b>		
<b>Functional Areas and Functions</b>	User logins**	If this import contains new functions or functional areas to be created, and these are referenced by the user import performed earlier, you will need to re-run the Users import after the Functional Area and Functions import is completed.
<b>Extended Fields</b>	Queries	
<b>HTML Reports</b>	Queries	
<b>Metrics</b>	Reference Tables** Calculated metrics may include additional component dependencies as noted.	When exported from an environment, the metrics workbook will contain associations to all related process models or related metrics. If these metrics or process models have not been created yet, the associations will cause errors when loading. Additionally, if metrics include associations via their calculation expressions, these associations might cause errors when loading the import.

Configuration Item	Dependencies*	Notes
		<p><b>Important!</b> To minimize errors when creating new metrics, Sopheon recommends users create and load a truncated version of the workbook with all process model associations columns deleted, the <b>Is Calculated</b> field defined as <b>No</b> for all metrics, and the calculated expressions and triggers details removed as necessary.</p> <p>To apply these settings after the initial upload, a version of the workbook including all of these settings will need to be reloaded after the process models are imported. This will capture any metrics associations that were missing on the initial upload.</p>
<b>Matrices</b>	<p>Metrics</p> <p>Matrices that include calculated metrics may include additional component dependencies as noted.</p>	<p>When exported from an environment, the matrices workbook will contain associations to all related process models or related metrics. If these metrics or process models have not been created yet, the associations will cause errors when loading. Additionally, if metrics include associations via their calculation expressions, these associations might cause errors when loading the import.</p> <p><b>Important!</b> To minimize errors when creating new metrics, Sopheon recommends users create and load a truncated version of the workbook with all process model associations columns deleted, the <b>Is Calculated</b> field defined as <b>No</b> for all metrics, and the calculated expressions and triggers details removed as necessary.</p> <p>To apply these settings after the initial upload, a version of the workbook including all of these settings will need to be reloaded after the process models are imported. This will capture any metrics associations that were missing on the initial upload.</p>
<b>Accolade Online Reports</b>	<p>Metrics**</p> <p>User IDs**</p>	<p>Note that ownership can only be changed as necessary on the initial import of a new report.</p>

Configuration Item	Dependencies*	Notes
<b>Accolade Charts</b>	Accolade Online Report source User logins** Reference Tables**	
<b>Templates</b>	Metrics	
<b>Quick Grids</b>	Metrics Matrices**	
<b>Workflows</b>	Metrics Templates** Functions** Users**	
<b>Security Profiles</b>	Classes Metrics	
<b>MS Excel Reports</b>	Queries** Templates**	
<b>Layouts</b>	Metrics Online Reports Charts Quick Grids	<p>If layouts contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading the layout configuration.</p> <p>If any new layouts have the <b>Generate Global Link</b> defined as <b>Yes</b>, the upload will automatically generate the global link, however you may need to review and/or edit the link settings manually if they are not included in the Global Links import.</p>
<b>Complex Components</b>		
<b>Process Models</b>	Dependencies can include any combination of independent and dependent components	<p><b>Important!</b> After completing the Process Models import, re-import the following workbooks as necessary:</p> <ul style="list-style-type: none"> <li>• The Metrics workbook should be reloaded with the process model associations and calculations included.</li> <li>• The Matrices workbook should be reloaded with the calculations included.</li> <li>• The Classes workbook should be reloaded with the <b>Create Model in Planning</b> defined as <b>Yes</b> as necessary for classes/process</li> </ul>

Configuration Item	Dependencies*	Notes
		models that are to be available for creating in Innovation Planning.
<b>Migration Maps</b>	Process Models Metrics	If you have made manual changes to a process model's gate name that is referenced in the file, it can cause errors with the Migration Map import. These migration maps will have to be manually created in the new environment.
<b>Project Link Types</b>	Process Models Metrics	
<b>Global Links</b>	Layouts** Process Models**	If global links contain new planning views that have not been created yet, they will cause errors when loading. These planning views will have to be manually created in the new environment prior to uploading global links configuration.  If the Layout import included new layouts with the <b>Generate Global Link</b> defined as <b>Yes</b> , the associated global link has been created. The settings for these links can either be updated manually, or can be included in the Global Link import.

\* Dependencies listed are only if the component being imported is mentioned in the configuration.

\*\* The dependency only exists if the component is referenced within the configuration.

## Importing and Exporting Classes

Accolade provides Administrators and Process Designers the ability to export classes from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate classes in each environment, download the information and import it into the new environment.

The download exports the classes configuration information into a spreadsheet file with the parts grouped into tabs.

### To export classes:

1. From the **System** menu, select **Process > Classes**.
2. Select the classes that you want to download.

To narrow the list by class name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by process type, select a process type to display in the **Process Type** list. To download all classes, select **All**.

3. Click **Download** in the top right corner of the page.

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

#### To import classes into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any classes that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Classes**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the classes in the spreadsheet, and adds any new classes with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Classes Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each class in the order listed below. For a description of each class setting, see the Creating Classes topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Class Definition

Column Name	Accepted Values on Upload*	Additional Notes
<b>Class System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new class is created.
<b>Class Name</b>	Any	If blank, the class does not upload.
<b>Process Type</b>	Gated Non-Gated Idea	If blank, the class does not upload.
<b>Icon</b>	Valid icon name  <ul style="list-style-type: none"> <li>• Beaker ***</li> <li>• Circle ***</li> <li>• Cube ***</li> <li>• Folder ***</li> <li>• Gated ***</li> <li>• Gear ***</li> <li>• Hierarchy ***</li> <li>• Iteration ***</li> <li>• Puzzle ***</li> <li>• Square ***</li> <li>• Triangle ***</li> <li>• Miscellaneous <ul style="list-style-type: none"> <li>Circles</li> <li>Clock</li> <li>Color Wheel</li> <li>Cubes</li> <li>Cycle</li> <li>Eye</li> <li>Flame</li> <li>Funnel</li> <li>Gears</li> <li>Idea</li> <li>Iteration</li> <li>Non-Gated</li> <li>Note</li> <li>Pie</li> <li>Pieces</li> </ul> </li> </ul>	Select a category and color combination.  *** All categories except for Miscellaneous allow for six color options - Blue, Green, Orange, Pink, Purple, and Red. The Folder and Gated categories also allow the color option Classic.  Use the format (category) - (color) without the parentheses. For example, Beaker - Blue.  If blank, the class does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
	Star	
<b>Description</b>	Any	Can be blank.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Gate Line-Up</b>	Default to included Default to excluded Always included Always excluded	If <b>Process Type</b> is <b>Non-Gated</b> , <b>Always Excluded</b> must be selected. If blank, the class does not upload.
<b>Reporting</b>	Default to included Default to excluded Always included Always excluded	If blank, the class does not upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Is Portfolio</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Enable Email Notification</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Include in Portfolio Optimizer</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Include in Resource Editor</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Include in Save to Accolade</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Include in Time Tracking</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show in Planning</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Create Model in Planning</b>	Valid process model system name	If <b>Show in Planning</b> is <b>Yes</b> , a valid process model system name should be entered. If <b>Show in Planning</b> is <b>No</b> , leave blank.  <b>Note:</b> If you are moving class and process model configuration and new classes have the <b>Create Model in Planning</b>

Column Name	Accepted Values on Upload*	Additional Notes
		defined as <b>Yes</b> , clear this from the workbook prior to upload. In order to apply this setting, this will need to be added back to the workbook, and the workbook reloaded after the process models are imported.
<b>Include in Work Pod</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Event Reason Code

Event reason codes setup are optional when importing classes. The worksheet must be included in the spreadsheet file, but can be left blank if the classes do not have event reason codes.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Class System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file.
<b>Event Type</b>	In Trouble Change Project Manager Change Gate Date Change Gate Decision - Conditional Go Gate Decision - Kill Gate Decision - Hold Gate Decision - Recycle Gate Decision - Pending Decision	If blank, the event will not upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Event Reason Code</b>	Alphanumeric characters, underscore**	If blank, the event will not upload.
<b>Event Reason Name</b>	Any	If blank, the event will not upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Security

Column Name	Accepted Values on Upload	Additional Notes
<b>Class System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a class exists, its settings are changed with the values in the uploaded file.
<b>Configuration Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting Process Models

Accolade provides Administrators and Process Designers the ability to export process model information from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate process models in each environment, download the information and import it into the new environment.

The download exports the process model configuration information into a spreadsheet file with the parts of the process model grouped into tabs.

**Note:** The download does not include metric associations. If you are using the process described below to create new models, ensure that templates are in place in the Template Library, import the models, and then associate metrics for each individual model or for multiple models at one time using the metric export/import utility.

### To export model settings:

**Note:** If you wish to download a process model, you may select up to 20 gatekeepers. If you add more than 20 gatekeepers, the model cannot be downloaded.

1. From the **System** menu, select **Process > All Models**.
2. Select the models that you want to download.

To narrow the list by process model name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by class, select a class to display in the **Class** list. To download all process models, select **All**.

3. Click **Download** in the top right corner of the page.

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

**Note:** Only process models to which you have view and/or edit configuration access group rights will download. Process models and components you can only view may be included in the file, but you can only upload changes to models and components to which you have explicit edit permission.

### To import model settings into Accolade:

1. Ensure the data within the spreadsheet file meets the requirements for a successful import.
2. Remove any models from the spreadsheet that you do not want to include in the upload and save the file.
3. From the **System** menu, select **Process > All Models**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the models in the spreadsheet, and adds any new models with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Process models that are imported are subject to access group configuration rules. The user may assign components to a process model parent in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete model upload. Once the upload is complete, component access groups can be reviewed and edited from the process model's component tree tab.

## Model Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each process model, including stage and gate configuration, in the order listed below. For a description of each model setting, see the online Help for Creating Gated and Non-Gated Process Models or Creating Idea Process Models (if creating an Idea model).


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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Process Models

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**  Must start with an A - Z or a - z character.	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new model is created.
<b>Display Name</b>	Any	If blank, the model does not upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Disable Add New</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide From Add New</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Default Portfolio Model</b>	Valid process model system name	Applies to models used for Idea campaigns.
<b>Default Accolade Team Leader User</b>	Valid login information for an Accolade user	If blank or invalid, set to <b>None</b> or to the metric value set in the <b>Default Accolade Team Leader Metric</b> column.
<b>Default Accolade Team Leader Metric</b>	Valid metric system name	If blank or invalid, set to <b>None</b> or to the Accolade user defined in the <b>Default Accolade Team Leader User</b> column.  If a value is also available in the <b>Default Accolade Team Leader User</b> column, the upload uses that column's value.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Class System Name</b>	Valid class system name that matches a valid process type	The class and process type must match. If not, the model changes do not upload.  If the class does not exist, the upload creates a new class.
<b>Process Type</b>	Gated Non-Gated Idea	All other values are treated as blank and the row does not upload.   You cannot change an existing model's process type.
<b>Allow Mid-Process Project Start for Creation</b>	Select by Stage Select by Gate No	All other values are treated as <b>No</b> on upload.
<b>Allow Mid-Process Project Start for Migration</b>	Select by Stage Select by Gate No	All other values are treated as <b>No</b> on upload.
<b>Description</b>	Any	Can be blank.
<b>Related Document Categories</b>	Any	Separate categories using the pipe (   ) character.  Can be blank.
<b>Initial Tab</b>	Valid project page name or valid layout system name	Indicated value must be listed on the <b>Pages</b> tab in the <b>Page System Name</b> column.
<b>Default Access Group</b>	Valid access group system name	Blank or invalid values do not set an access group.
<b>Idea Deliverable System Name</b>	Valid name of a web document assigned to a deliverable within an idea model	Applies to idea models only.
<b>Disable Idea File Attachments</b>	Yes, Y, True, 1, X*	Applies to idea models only.  All other values are treated as <b>No</b> on upload.
<b>Hide The Idea Type Row</b>	Yes, Y, True, 1, X*	Applies to idea models only.  All other values are treated as <b>No</b> on upload.
<b>Hide Gate</b>	Yes, Y, True, 1, X*	Applies to idea models only.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Decision Option For Idea Submitter</b>		All other values are treated as <b>No</b> on upload.
<b>Process Model Display Type</b>	Compact Traditional	All other values are treated as <b>Compact</b> on upload.
<b>Set Gates Page to read-only</b>	Yes, Y, True, 1, X*	Applies to gated models and idea models with gates only.  All other values are treated as <b>No</b> on upload.
<b>Restricted Access Groups</b>	Valid access group system name	Separate names using the pipe (   ) character.
<b>Default Access Group Metric</b>	Valid metric system name of a String, List, Long String, or Number metric	All other values do not assign a metric to set the access group.
<b>Project Name Metric</b>	Valid metric system name	If blank or invalid, the project name is not determined by a metric value.
<b>Enforce Function for Team Selection</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Enforce Project Security</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.   If you enable this option, existing projects using this model that contain users assigned outside their security access <i>are not</i> automatically removed from the project.
<b>Protect Document Versions from Deletion</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Project ID Metric</b>	Valid metric system name	If blank or invalid, the project ID is not determined by a metric value.
<b>Require Project Manager on Create</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	Separate names using the pipe (   ) character.

Column Name	Accepted Values on Upload*	Additional Notes
		If blank, the model does not upload.
<b>Extend Project Edit Rights</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Start Date Display Name</b>	Any	If blank, the model does not upload.
<b>Show Creation</b>	Hide Required Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Process Graphic</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Resource Editor</b>	Hide ReadOnly	If blank, the model does not upload.
<b>End Date Display Name</b>	Any	If blank, the model does not upload.
<b>Show Creation</b>	Hide Required Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Process Graphic</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Resource Editor</b>	Hide ReadOnly	If blank, the model does not upload.
<b>Currency Show Creation</b>	Hide Edit	If blank, the model does not upload.
<b>Show Migration</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Extended Project Data 1...10 Display Name***</b>	Any	If blank, the model does not upload.
<b>Show Creation***</b>	Hide Edit	If blank, the model does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Show Migration***</b>	Hide ReadOnly Edit	If blank, the model does not upload.
<b>Show Planning***</b>	Hide Edit	If blank, the model does not upload.

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

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

\*\*\* Each **Extended Project Data** field in the spreadsheet has a set of columns to set the display name and hide, edit, and read-only details as described here. For example Extended Project Data 1, Extended Project Data 2, and so on up to a maximum of 10.

- Pages

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Page System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a page exists, its settings are changed with the values in the uploaded file.
<b>Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Visibility Layout Rule System Name</b>	Valid system name of a layout rule established on the Layout Rules worksheet	All other values are set to <b>None</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Link Rules

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Link Rule System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link exists, its settings are changed with the values in the uploaded file.
<b>Link Rule Name</b>	Any	
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link exists, its settings are changed with the values in the uploaded file.
<b>Link Process Model System Names</b>	Alphanumeric characters, underscore**	Separate model names using the pipe (   ) character.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.

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- Link Rule Metrics

The Link Rule Metrics worksheet contains the metric conditions that must be met for a rule defined at the model-level to take effect. The contents of this worksheet works with the rules defined in the [Link Rules](#) worksheet. Each row in the worksheet represents a single condition for a link rule.

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Link Rule Name</b>	Valid name of a link rule established on the Link Rules worksheet	
<b>Metric System Name</b>	Valid metric system name	If blank or invalid, the condition does not upload.
<b>Metric Value</b>	The value the metric must be set to for the project link to be created	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.



Column Name	Accepted Values on Upload	Additional Notes
<b>Source Metric System Name</b>	Valid metric system name	If blank or invalid, the condition does not upload.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.

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- Phases

The Phases worksheet contains the information about each stage/gate combination within the model. After a model is used in a project (open or closed) you can no longer add or reorder a stage or a gate in that model. However, you can update the details within the model as described below.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	The number that identifies the placement of the phase within the Phase Gate sequence. For example, a Phase ID of 1 indicates the first stage/gate pair within the model. Phase ID of 2 indicates the stage/gate pair that follows the first stage/gate pair within the model, and so on. A model can have a single stage or a single gate.
<b>Stage Name</b>	Any	Can be blank if at least one <b>Gate Name</b> is included.
<b>Stage Description</b>	Any	Can be blank.
<b>Gate Name</b>	Any	Can be blank if at least one <b>Stage Name</b> is included.
<b>Gate Description</b>	Any	Can be blank.
<b>Default Gate Manager</b>	Project Manager Project Creator None	All other values are set to <b>None</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Set Gate Date Metric</b>	Valid metric system name	All other values are treated as blank on upload.
<b>Set Gate Date At Project Creation</b>	None Show Required	All other values are set to <b>None</b> on upload.
<b>Require Gatekeeper Voting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Set Gate Decision On Approval</b>	Yes, Y, True, 1, X*	If <b>Set Gate Decision On Approval</b> is defined as Yes, Y, True, 1, X*, the <b>Require Gatekeeper Voting</b> column must also be Yes, Y, True, 1, X*.  All other values are treated as <b>No</b> on upload.
<b>Gate Owner Can Skip</b>	Yes, Y, True, 1, X*	If <b>Gate Owner Can Ship</b> is defined as Yes, Y, True, 1, X*, the <b>Require Gatekeeper Voting</b> column must also be Yes, Y, True, 1, X*.  All other values are treated as <b>No</b> on upload.
<b>Set Go Restriction Message Metric</b>	Valid metric system name	All other values are treated as blank on upload.
<b>Gatekeeper Function***</b>	Valid function system name	All other values are set to <b>None</b> on upload.
<b>Gatekeeper Login***</b>	Valid login information for an Accolade user	All other values are set to <b>None</b> on upload.
<b>Gatekeeper Enforce Function on User Selection***</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Min Gate Date Metric</b>	Valid metric system name	All other values are treated as blank on upload.
<b>Max Gate Date Metric</b>	Valid metric system name	All other values are treated as blank on upload.
<b>Gate Layout</b>	Valid layout system name	Can be blank if no layouts are selected.  All other values are set to <b>None</b> on upload.

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

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\*\*\* **Gatekeeper Function, Gatekeeper Login and Gatekeeper Enforce Function on User Selection** columns are included for each gatekeeper listed in the model.

- Gate Documents

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
<b>Document Name</b>	Any	If blank, the document does not upload.
<b>Document System Name</b>	Alphanumeric characters, underscore**	If blank, the document does not upload.
<b>Description</b>	Any	Can be blank.
<b>Template</b>	Any	Can be blank.
<b>Template System Name</b>	Valid template system name of a template available in the Template Library	The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.  If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.  All other values upload with no template attached.  If updating to a new template and the new name is not valid, the system will default and retain the current template.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Allow Version Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	Separate names using the pipe (   ) character.

Column Name	Accepted Values on Upload*	Additional Notes
		If blank, the document does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Deliverables and Activities

Deliverables and activities are exported onto separate worksheets within the **ProcessModelWorkbook.xlsx** file. However, the content within each worksheet that defines a deliverable or an activity is the same as described below.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
<b>System Name</b>	Alphanumeric characters, underscore**	If blank, the deliverable/activity does not upload.
<b>Name</b>	Any	If blank, the deliverable/activity does not upload.
<b>Description</b>	Any	Can be blank.
<b>Template</b>	Any	Can be blank.
<b>Template System Name</b>	Valid template system name of a template available in the Template Library	The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>
<b>Quick Grids</b>	Valid quick grid system name	<p>Separate categories using the pipe (   ) character.</p> <p>Can be blank.</p>
<b>Workflow</b>	Valid workflow system name	Can be blank.
<b>Workflow Options</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Link to Phase</b>	Valid phase ID within the model	<p>Used in combination with <b>Link to Phase Name</b> and <b>Link to Assignment System Name</b> to determine the stage and assignment to link to.</p> <p>All other values upload with no link.</p>
<b>Link to Assignment System Name</b>	Valid deliverable or activity system name	<p>Used in combination with <b>Link to Phase Name</b> and <b>Link to Phase ID</b> to determine the stage and assignment to link to.</p> <p>All other values upload with no link.</p>
<b>Link to Assignment Type</b>	Deliverable, Activity	All other values upload with no link.
<b>Link to Only Publish</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Function</b>	Valid function system name	All other values are set to <b>None</b> on upload.
<b>Default Start Date Type</b>	Manual Days Percent	All other values are set to <b>Manual</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Default Start Date Value</b>	Number	Leave blank if <b>Default Start Date Type</b> is set to <b>Manual</b> .
<b>Default Deadline Type</b>	Manual Days DaysAfterStart Percent	All other values are set to <b>Manual</b> on upload.
<b>Default Deadline Value</b>	Number	Leave blank if <b>Default Deadline Date Type</b> is set to <b>Manual</b> .
<b>Default Finish Date Type</b>	Manual Days DaysAfterStart Percent	All other values are set to <b>Manual</b> on upload.
<b>Default Finish Date Value</b>	Number	Leave blank if <b>Default Finish Date Type</b> is set to <b>Manual</b> .
<b>Process Assistance URL</b>	Any	Can be blank.
<b>Order</b>	Number	Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Allow Version Deletion</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Allow Project Manager and Owner to Delete Activities</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Allow Not Required Status</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Allow Default Shared Ownership</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Related Documents</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Disable Complete Status When No Published Version Exists</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Disable Complete Status When Quick Grid</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Required Values are Missing</b>		
<b>Workflow Template</b>	Any	Can be blank.
<b>Workflow Template System Name</b>	Valid template system name of a Process Document template available in the Template Library	<p>The template won't be added if the user does not have the appropriate configuration access group rights to edit the template and a warning will be produced but the deliverable/activity will still be uploaded without the template.</p> <p>If the template does not share the appropriate access group with the deliverable/activity then a warning will be produced but the template will still be added to the deliverable/activity.</p> <p>All other values upload with no template attached.</p> <p>If updating to a new template and the new name is not valid, the system will default and retain the current template.</p>
<b>Restricted Access User Roles</b>	Valid user role system name	<p>Separate system roles using a semicolon ( ; ) character.</p> <p>Can be blank.</p>
<b>Publish On Upload</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Enforce Function on User Selection</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration Access Group</b>	Valid access group display name	<p>Separate names using the pipe (   ) character.</p> <p>If blank, the deliverable/activity does not upload.</p>
<b>Visibility Rule System Name</b>	Valid conditional rule system name	All other values are set to <b>None</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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



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- Matrix Metric Filters

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.
<b>Deliverable System Name</b>	Valid deliverable system name	Used for matching for upload.  If a deliverable exists, its settings are changed with the values in the uploaded file.
<b>Activity System Name</b>	Valid activity system name	Used for matching for upload.  If an activity exists, its settings are changed with the values in the uploaded file.
<b>Display in Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Matrix System Name</b>	Valid matrix system name	Used for matching for upload.  If a matrix exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	Must be an existing value in the matrix defined in <b>Matrix System Name</b> , and must be a list metric with a defined list.

Column Name	Accepted Values on Upload	Additional Notes
<b>Filter</b>	DisplayAndUpdateAllRows DisplayAndUpdateOnlyRowsContaining DisplayAllRowsAndUpdateOnlyRowsContaining	If blank, the filter does not upload.
<b>Filter Value</b>	Valid list value for the metric defined in <b>Metric System Name</b>	Separate values using the pipe (   ) character.  Can be blank.

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

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- Dependencies

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.
<b>Source Type</b>	Activity Deliverable	If blank, the dependency does not upload.
<b>Source System Name</b>	Valid activity/deliverable source system name	If blank, the dependency does not upload.
<b>Target Type</b>	Activity Deliverable	If blank, the dependency does not upload.
<b>Target System Name</b>	Valid activity/deliverable target system name	If blank, the dependency does not upload.
<b>Dependency Type</b>	Start-Start Start-Finish Finish-Start Finish-Finish	If blank, the dependency does not upload.

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- Process Graphic Style

Column Name	Accepted Values on Upload*	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Phase ID</b>	Number	Used for matching for upload.  If a phase exists, its settings are changed with the values in the uploaded file.
<b>Stage Icon</b>	Valid icon name	The icon assigned to the stage within the phase.  Valid icon names are listed with each icon's picture when you click <b>Icon</b> in the Process Graphic definition page.
<b>Stage Past Color</b>	Valid hex color code	If left blank, defaults to #EFEFEF.
<b>Stage Current Color</b>	Valid hex color code	If left blank, defaults to #C9E1AC.
<b>Stage Future Color</b>	Valid hex color code	If left blank, defaults to #D6D6D6.
<b>Gate Current Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the next gate.  All other values upload with the default diamond shape.
<b>Gate Current Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Future Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to future gates.  All other values upload with the default diamond shape.
<b>Gate Future Color</b>	Valid hex color code	If left blank, defaults to #B0B0B0.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Gate Go Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to gates with a <b>Go</b> decision entered.  All other values upload with the default diamond shape.
<b>Gate Go Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Go Decision Badge</b>	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a <b>Go</b> decision entered.  All other values upload with the default Go overlay.
<b>Gate Conditional Go Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to gates with a <b>Conditional Go</b> decision entered.  All other values upload with the default diamond shape.
<b>Gate Conditional Go Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Conditional Go Decision Badge</b>	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a <b>Conditional Go</b> decision entered.  All other values upload with the default Conditional Go overlay.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Gate Suspend Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon overlay assigned to gates with a <b>Hold</b> decision entered.  All other values upload with the default diamond shape.
<b>Gate Suspend Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Suspend Decision Badge</b>	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a <b>Hold</b> decision entered.  All other values upload with the default Hold overlay.
<b>Gate Cancel Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the gates where a project is canceled.  All other values upload with the default diamond shape.
<b>Gate Cancel Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Cancel Decision Badge</b>	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a <b>Kill</b> decision entered.  All other values upload with the default Kill overlay.


Column Name	Accepted Values on Upload*	Additional Notes
<b>Gate Recycle Shape</b>	arrow chevron circle diamond gear hexagon parallelogram plus quarterCircle	The icon assigned to the gates with a <b>Recycle</b> decision entered.  All other values upload with the default diamond shape.
<b>Gate Recycle Color</b>	Valid hex color code	If left blank, defaults to #417491.
<b>Gate Recycle Decision Badge</b>	ConditionalGo Go Hold Kill001 Kill002 Recycle001 Recycle002	The icon overlay assigned to gates with a <b>Recycle</b> decision entered.  All other values upload with the default Recycle overlay.

\* Valid hex color codes include any combination of six characters between a and f, and 0 and 9. For example, #227755 is a shade of green, #000000 is black, and #ffff00 is yellow. The # is implied in the spreadsheet and not required in the upload.

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

- Auto Gate Decision Rules

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload.  If a phase exists, its settings are changed with the values in the uploaded file.
<b>Gate Decision Code***</b>	Number	The number that identifies the gate decision type.

Column Name	Accepted Values on Upload	Additional Notes
		Go = 1 Kill = 2 Hold = 3 Recycle = 4 Pending Decision = 6 A Conditional Go decision cannot be set using an automated gate decision.   If you have <a href="#">configured your gate decision names</a> to use different terminology, the numbers apply to the configured names that mapped to the defaults names listed above.
<b>Metric System Name</b>	Valid metric system name	All other values do not assign a metric condition to the gate.
<b>Metric Value</b>	The value the metric must be set to for the gate decision to be set.	Blank or invalid values do not set a metric condition.

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

\*\*\* To set more than one metric condition per gate decision type, create additional rows using the same **Gate Decision Code**.



- Required Conditions for Go

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Phase ID</b>	Number	Used for matching for upload. If a phase exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	All other values do not assign a metric condition to restrict the gate decision to the gate.
<b>Metric Value</b>	The value the metric must be set to for the gate decision to be set to Go or Conditional Go.	Blank or invalid values do not set a metric condition.

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

- Team Page Configuration

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Control ID</b>	gatekeepergrid gatekeepergrid_function gatekeepergrid_gates gatekeepergrid_name	Identifies the grid and columns within each grid to assign accessibility and order attributes.

Column Name	Accepted Values on Upload	Additional Notes
	teammembergrid teammembergrid_ createstatusreports teammembergrid_function teammembergrid_name teammembergrid_primary teammembergrid_stages  workflowactionownergrid workflowactionownergrid_ actions workflowactionownergrid_ function workflowactionownergrid_ name	
<b>Accessibility</b>	Available Unavailable	All other values are treated as <b>Available</b> on upload.
<b>Order</b>	Number	Is set to the default order if no order is provided.

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

- Visibility Rules

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a model exists, its settings are changed with the values in the uploaded file.
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a condition rule exists, its settings are changed with the values in the uploaded file.
<b>Name</b>	Any	
<b>Metric System Name</b>	Valid metric system name	All other values do not assign a metric condition.
<b>Value</b>	String	The value the metric must equal in order to show the deliverable or activity.

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

- Layout Rules

Column Name	Accepted Values on Upload	Additional Notes
<b>Process Model System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a model exists, its settings are changed with the values in the uploaded file.
<b>Layout System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
<b>Role Name</b>	Valid Accolade user role	Include a separate row for each role

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

## Importing and Exporting Migration Maps

Accolade provides Administrators and Process Designers the ability to export migration maps from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate migration maps in each environment, download the information and import it into the new environment.

The download exports the migration map configuration information into a spreadsheet file with the parts grouped into tabs.

### To export migration maps:

1. From the **System** menu, select **Process > Migration Maps**.
2. Click **Download** in the top right corner of the page.

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

### To import migration maps into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any migration maps that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Migration Maps**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the migration maps in the spreadsheet, and adds any new migration maps with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

## Migration Map Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each migration map in the order listed below. For a description of each migration map setting, see the Creating Migration Maps topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Migration Map

Column Name	Accepted Values on Upload*	Additional Notes
<b>Migration Map System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a migration map exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new migration map is created.
<b>Migration Map Name</b>	Any	If blank, the migration map does not upload.
<b>From Model</b>	Any valid process model name	If blank, the migration map does not upload.
<b>To Model</b>	Any valid process model name	If blank, the migration map does not upload.
<b>Next Gate</b>	Any	If blank, the migration map does not upload.
<b>Retain Project Manager</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Retain Project Access Group</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Retain Project Team</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Retain Project History</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Copy Project Links</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Close Source Project</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

# Importing and Exporting Templates

Accolade provides Administrators and Process Designers the ability to export templates configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate templates in each environment, download the information and import into a different environment.

The download exports the templates configuration information into a spreadsheet file with the parts of the templates grouped into tabs.

## To export template settings:

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

2. Select the templates that you want to download.

To narrow the list by template name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all templates, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the templates into a zip file which contains a workbook file with all of the template system details, as well as an individual file folder containing each template document, and saves it to a temporary internet files directory. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

## To import template settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any templates that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Template Library**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing templates in the spreadsheet, and adds any new templates with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent.

This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Template Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the system settings for each template in the order listed below. For a description of each template setting, see the Adding Templates to the Template Library topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Template Details

Column Name	Accepted Values on Upload*	Additional Notes
<b>Template System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a template exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new template is created.
<b>Template Name</b>	Any	If blank, the template does not upload.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the template is placed in the <b>Default</b> category.
<b>Description</b>	Any	Can be blank.
<b>Type</b>	Online Form Process Document Spreadsheet Report Presentation Project Plan Image PDF, Email, Other	If blank, the template does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Security

Column Name	Accepted Values on Upload	Additional Notes
Template System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a template exists, its settings are changed with the values in the uploaded file.
Access Group	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting Quick Grids

Accolade provides Administrators and Process Designers the ability to export quick grid information from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate quick grids in each environment, download the information and import into the new environment.

The download exports the quick grid configuration information into a spreadsheet file with the parts of the quick grid grouped into tabs.

### To export quick grids:

1. From the **System** menu, select **Page Design > Quick Grids**.
2. In the **Category** field, select the category containing the quick grids you want to download.  
  
To narrow the list by quick grid name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.  
  
To narrow the list by category, select a category to display in the **Category** list. To download all quick grids, select **All**.
3. Click **Download** in the top right corner of the page.

Accolade downloads the quick grids into a zip file which contains a workbook file with all of the quick grid system details, as well as an individual file folder containing any related JavaScript files, and saves it to a temporary internet files directory. Save it to a more accessible location.



**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

#### To import quick grids into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any quick grids that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Quick Grids**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the quick grids in the spreadsheet, and adds any new quick grids with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.



To upload JavaScript files, save the JavaScript file in a folder. Match the folder name with the quick grid system name, as defined in the spreadsheet file for uploading the quick grids. Save the folder and the completed upload file to a zipped folder. Upload the zipped folder to import the quick grids and JavaScript files.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Quick Grid Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each quick grid in the order listed below. For a description of quick grid settings, see the [Creating Quick Grids](#) or [Adding Software Controls and Metrics to Quick Grids](#) topics in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing [Importing and Exporting Configuration Best Practices](#) in the online help before making changes in a production environment.

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- Quick Grid

The Quick Grid worksheet contains the settings for the quick grids being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a quick grid exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new quick grid is created.
<b>Quick Grid Name</b>	Any	If blank, the quick grid does not upload.
<b>Description</b>	Any	Can be blank.
<b>Quick Grid Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If blank, the quick grid is placed in the <b>Default</b> category.
<b>Protected Grid</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Create PDF</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Publish PDF</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Grid Properties

The Grid Properties worksheet contains the settings for the individual grids being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
<b>Quick Grid Grid Name</b>	Any	If blank, the grid does not upload.
<b>Grid Type</b>	Matrix Standard	If blank, the grid does not upload.
<b>Matrix System Name</b>	Valid matrix system name	If <b>Grid Type</b> is selected as <b>Matrix</b> , enter a valid matrix system name. Otherwise, leave blank.
<b>Number of Columns</b>	Any number	The number of columns in the grid. If blank, the grid does not upload.
<b>Number of Rows</b>	Any number	The number of rows in the grid. If blank, the grid does not upload.
<b>Rank</b>	Any number	The order of the individual grids within the quick grid. If blank, the grid does not upload.
<b>Tooltip</b>	Any	Can be blank.
<b>Show Grid Title</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Grid</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Collapsible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Default To</b>	Collapsed Expanded	If blank, defaults to <b>Expanded</b> .
<b>Background Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Border Style</b>	None Dotted Dashed Solid Double Groove Ridge Inset Outset	If blank, defaults to <b>None</b> .
<b>Border Width</b>	Valid pixel values	If blank, defaults to <b>1</b> .
<b>Border Color</b>	Valid hex color code	If blank, defaults to color code #ededed.

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

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

- Columns

Column Name	Accepted Values on Upload	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
<b>Column</b>	Any number	The column number must be less than or equal to the number of columns defined in the quick grid. If blank, the grid does not upload.
<b>Minimum Width</b>	Any number	Can be blank.
<b>Fixed Width</b>	Any number	Can be blank.

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

- Rows

Column Name	Accepted Values on Upload	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new grid is created.
<b>Row</b>	Any number	The row number must be less than or equal to the number of rows defined in the quick grid. If blank, the grid does not upload.
<b>Minimum Height</b>	Any number	Can be blank.
<b>Fixed Height</b>	Any number	Can be blank.

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

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

- Cell Properties

The Cell Properties worksheet contains the settings for the individual cells being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Cell System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new cell is created.
<b>Quick Grid Column</b>	Any number	The cell's column location within the grid. If blank, the cell does not upload.
<b>Quick Grid Row</b>	Any number	The cell's row location within the grid. If blank, the cell does not upload.
<b>Column Span</b>	Any number	If a merged cell, the number of columns that the cell spans. If blank, defaults to <b>1</b> .
<b>Row Span</b>	Any number	If a merged cell, the number of rows that the cell spans. If blank, defaults to <b>1</b> .
<b>Control Type</b>	Aggregate Button Checkbox CheckboxGroup ComboBox DateInput DropDownBox EmailTextBox FormattedText ListBox MetricLabel MultilineTextBox NumericTextBox PairedListBox RadioButtonGroup RelativeDate RichText TemplateImage TextBox UserSelector	If <b>Aggregate</b> , <b>Button</b> , <b>FormattedText</b> , or <b>TemplateImage</b> are selected, the <b>Source Type</b> should be defined as <b>LocalElement</b> .  If blank, the cell does not upload.
<b>Source Type</b>	LocalElement Metric Metadata Nothing	If <b>Aggregate</b> , <b>Button</b> , <b>FormattedText</b> , or <b>TemplateImage</b> are selected as the <b>Control Type</b> , this must be defined as <b>LocalElement</b> .  If blank, the cell does not upload.
<b>Metadata</b>	Valid metadata system name	If <b>Source Type</b> is selected as <b>Metadata</b> , enter the metadata system name.

Column Name	Accepted Values on Upload*	Additional Notes
		Otherwise, leave blank.
<b>Default Value</b>	Any	Can be blank.
<b>Tooltip</b>	Any	Can be blank.
<b>List Source</b>	Any	Separate each list option by a pipe (   ) character.
<b>Empty Item Text</b>	Any	Can be blank.
<b>Control Width</b>	Valid pixel values	If blank, defaults to <b>None</b> .
<b>Sort</b>	Ascending Descending NoSorting	If blank, defaults to <b>No Sorting</b> .
<b>Enable Markdown</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Link To</b>	None Layout Project Page URL	If blank, defaults to <b>None</b> .
<b>Link To Destination</b>	Valid link address	Can be blank.
<b>Link To Index</b>	Any number, up to 10 digits	Can be blank.
<b>Open in New Tab</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Metric Data Type</b>	Valid metric data type	If <b>Source Type</b> is selected as <b>Metric</b> , enter the metric's data type. Otherwise leave blank.
<b>Metric System Name</b>	Valid metric system name	If <b>Source Type</b> is selected as <b>Metric</b> , enter the metric's system name. Otherwise leave blank.
<b>Size</b>	Any number	If blank, defaults to <b>0</b> .
<b>Max Length</b>	Any number	If blank, defaults to <b>0</b> .
<b>Prefix</b>	Any	Can be blank.
<b>Suffix</b>	Any	Can be blank.
<b>Allow Negative</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Read Only</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Required</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>User Roles</b>	Valid Accolade user role	Separate each role by a pipe (   ) character.
<b>Text</b>	Any	Can be blank.
<b>Rows</b>	Any number	If blank, defaults to <b>0</b> .
<b>Columns</b>	Any number	If blank, defaults to <b>0</b> .
<b>Project Image Content</b>	Valid image file in Accolade	Can be blank.
<b>Template Image Content</b>	Valid image file in Accolade	Can be blank.
<b>Show Remaining Character Count</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Inline Editing</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Font</b>	Valid font name	If blank, defaults to Noto Sans.
<b>Font Size</b>	Valid pixel values	If blank, defaults to pixel size 13.
<b>Bold</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Italic</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Underline</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Text Color</b>	Valid hex color code	If blank, defaults to color code #404040.
<b>Alignment</b>	Left Center Right Top Center Bottom	Separate each alignment selection with a pipe (   ) character. If blank, defaults to <b>Left   Top</b> alignment.
<b>Background Color</b>	Valid hex color code	If blank, defaults to #ffffff.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Border Style</b>	None Dotted Dashed Solid Groove Ridge Inset Outset	If blank, defaults to <b>None</b> .
<b>Border Width</b>	Valid pixel values	If blank, defaults to no border/none.
<b>Border Color</b>	Valid hex color code	If blank, defaults to no border/none.
<b>Tooltip Alignment</b>	Top Middle Bottom	If blank, defaults to <b>Middle</b> alignment.

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

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

- Text Conditions

The Text Conditions worksheet contains the conditional text settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional text settings, this worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Cell System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
<b>RGB</b>	Valid hex color code	If blank, the condition does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Compare Type</b>	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
<b>Value</b>	Any	If blank, the condition does not upload.

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

- **Border Conditions**

The Border Conditions worksheet contains the settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional border settings, this worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Cell System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
<b>RGB</b>	Valid hex color code	If blank, the condition does not upload.
<b>Compare Type</b>	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
<b>Value</b>	Any	If blank, the condition does not upload.

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

- **Background Conditions**

The Background Conditions worksheet contains the settings for the individual cells being uploaded or downloaded. If the quick grid does not have conditional background settings, this

worksheet can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a grid exists, its settings are changed with the values in the uploaded file.
<b>Quick Grid Cell System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a cell exists, its settings are changed with the values in the uploaded file.
<b>RGB</b>	Valid hex color code	If blank, the condition does not upload.
<b>Compare Type</b>	Equal GreaterThan GreaterThanOrEqual LessThan LessThanOrEqual NotEqual	If blank, the condition does not upload.
<b>Value</b>	Any	If blank, the condition does not upload.

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

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>Quick Grid System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a quick grid exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

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

## Importing Matrix Grids

Matrix grids will be included in the import or export data; however, the matrix and its metrics are not imported or exported with the quick grid. You will need to import the matrix and its metrics on the import server before importing the quick grid. The matrix and metrics should have the same system names as they had on the export server.

If a matrix grid is imported onto a server that does not have the matrix or metrics loaded, the metrics are removed from the grid cells. You will need to re-associate them with the grid columns after the matrix and metrics are created on the import server.

### Notes:

- Before importing a quick grid, make sure that all related metrics have been imported. A quick grid's metrics are not imported along with the grid, so the metrics must be imported independently.

## Importing and Exporting Workflows

Accolade provides Administrators and Process Designers the ability to export workflows from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate workflows in each environment, download the information and import it into the new environment.

The download exports the workflow configuration information into a spreadsheet file with the parts grouped into tabs.

### To export workflows:

1. From the **System** menu, select **Process > Workflows**.
2. Select the workflows that you want to download.

To narrow the list by workflow name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

3. Click **Download** in the top right corner of the page.

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

### To import workflows into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any workflows that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > Workflows**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the workflows in the spreadsheet, and adds any new workflows with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Workflow Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each workflow in the order listed below. For a description of each workflow setting, see the Creating Workflows topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Details

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new workflow is created.
<b>Workflow Name</b>	Any	If blank, the workflow does not upload.
<b>Description</b>	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the workflow is placed in the <b>Default</b> category.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Users cannot own multiple actions</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload. The workflow cannot be deleted if in use.

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

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

- **Start Conditions**

Start conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new start condition requirements, enter the new information to upload.
- If the workflows have existing start condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have start condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	If blank, the start condition requirement does not upload.  💡 Start condition requirements can include multiple metrics. Enter a separate row for each metric being added.

Column Name	Accepted Values on Upload	Additional Notes
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.  If blank, the start condition requirement does not upload.

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- Migration Map Rules

Migration maps are optional when importing workflows. The worksheet must be included in the spreadsheet file, but can be left blank if the workflows do not have migration map requirements.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Rule System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a workflow exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new rule is created.
<b>Rule Name</b>	Any	If blank, the rule does not upload.
<b>Map System Name</b>	Valid migration map system name	If blank, the rule does not upload.

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- Migration Map Rule Conditions

Migration maps are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new migration map condition requirements, enter the new information to upload.
- If the workflows have existing migration map condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have migration map condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Rule System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new rule is created.
<b>Map System Name</b>	Valid migration map system name	If blank, the migration map condition requirement does not upload.
<b>Metric System Name</b>	Valid metric system name	If blank, the migration map condition requirement does not upload.  💡 Migration map condition requirements can include multiple metrics. Enter a separate row for each metric being added.
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value. If blank, the migration map condition requirement does not upload.

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

- Steps

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new step is created.  💡 The Step and Automated Step system names must be unique within their



Column Name	Accepted Values on Upload*	Additional Notes
		💡 related workflow.
<b>Step Name</b>	Any	If blank, the step does not upload.
<b>Proceed after 1 decision</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	<p>The field is set to <b>0</b> on upload if no value is entered or the value is not a number.</p> <p>💡 The Step and Automated Steps order values must be unique within their related workflow.</p>

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

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

- Action

Column Name	Accepted Values on Upload*	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a workflow exists, its settings are changed with the values in the uploaded file.</p>
<b>Action System Name</b>	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a workflow step exists, its settings are changed with the values in the uploaded file.</p> <p>If a new, unique system name exists in the file when uploaded, a new action is created.</p>
<b>Action Name</b>	Any	If blank, the action does not upload.
<b>Step System Name</b>	Alphanumeric characters, underscore**	<p>Used for matching for upload.</p> <p>If a step exists, its settings are changed with the values in the uploaded file.</p>
<b>Description</b>	Any	Can be blank.
<b>Function</b>	Valid function system name	<p>If <b>Function</b> is defined, <b>Enforce on User Selection</b> should be set to <b>Yes</b>.</p> <p>Can be blank.</p>
<b>Enforce On User Selection</b>	Yes, Y, True, 1, X*	<p>If <b>Yes</b> is selected, <b>Function</b> must be defined.</p> <p>All other values are treated as <b>No</b> on upload.</p>

Column Name	Accepted Values on Upload*	Additional Notes
<b>Owner</b>	Valid Accolade user	Can be blank.
<b>Permissions</b>	Can Approve Can Edit Can Edit and Publish	If blank, the action does not upload.
<b>Can Skip</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Auth Req</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b># Days</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.


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

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

- Action Conditions

Action conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new action condition requirements, enter the new information to upload.
- If the workflows have existing action condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have action condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
<b>Action System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If an action exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	If blank, the action condition requirement does not upload.  Action condition requirements can

Column Name	Accepted Values on Upload	Additional Notes
		💡 include multiple metrics. Enter a separate row for each metric being added.
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.  If blank, the action condition requirement does not upload.

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- Automated Step

Automated steps are optional when importing workflows. The worksheet must be included in the spreadsheet file, but can be left blank if the workflows do not have automated steps.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If an automated step exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new automated step is created.  💡 The Step and Automated Step system names must be unique within their related workflow.
<b>Step Name</b>	Any	If blank, the step does not upload.
<b>Automated Action System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If an automated action exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new automated action is created.
<b>Automated Action Type</b>	CreatePDF PublishLatestDocumentVersion SetGateDate SetGateDecision	If blank, the automated action does not upload.
<b>Template Source</b>	DeliverableTemplate WorkflowTemplate	If <b>Automated Action Type</b> is selected as <b>CreatePDF</b> , a value must be entered. Use <b>DeliverableTemplate</b> as the template source for both deliverables and activities. Otherwise leave blank.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.  💡 The Step and Automated Steps order must be unique within their related workflow.

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- Automated Action Conditions

Automated action conditions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new automated action condition requirements, enter the new information to upload.
- If the workflows have existing automated action condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have automated action condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a workflow exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	If blank, the automated action condition requirement does not upload.  💡 Automated action condition requirements can include multiple metrics. Enter a separate row for each metric being added.
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.  If blank, the automated action condition requirement does not upload.

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

- Automated Gate Decision Rules

Automated gate decisions are optional when importing workflows. The worksheet must be included in the spreadsheet file, and has the following guidelines:

- If the workflows have new automated gate decision condition requirements, enter the new information to upload.
- If the workflows have existing automated gate decision condition requirements that are not being changed, leave the existing information in the spreadsheet. Clearing out the information will cause the upload to delete the requirement.
- If the workflows do not have automated gate decision condition requirements, the worksheet can be left blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Step System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a step exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload	Additional Notes
<b>Automated Gate Decision Rule</b>	Go Kill Hold Recycle Pending Decision	If <b>Automated Action Type</b> on the <b>Automated Step</b> worksheet is selected as <b>SetGateDecision</b> , a value must be entered. Otherwise leave blank.
<b>Metric System Name</b>	Valid metric system name	If blank, the decision rule condition requirement does not upload.
<b>Metric Value</b>	Valid metric value	Ensure the value entered here is appropriate for the metric type. For example, a Date metric should have a date as a value.  If blank, the decision rule condition requirement does not upload.

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

- Access Groups


Column Name	Accepted Values on Upload	Additional Notes
<b>Workflow System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a workflow exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting Layouts

Accolade provides Administrators and Process Designers the ability to export layouts from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate layouts in each environment, download the information and import it into the new environment.

The download exports the layout configuration information including all pods and layout settings into a spreadsheet file with the parts grouped into tabs.

 When importing layouts into Accolade, the thumbnail image for a layout displays with the message "No Image Available." All updated pods and layout settings are saved. Click to edit the layout to view the pods and settings. Saving and closing the layout regenerates a corresponding thumbnail image.

#### To export layout settings and pods:

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

2. Select the layouts that you want to download.

To narrow the list by layout name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all layouts, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the layouts into a zip file which contains a workbook file with all of the layout system details, as well as an individual file folder containing any related JavaScript and HTML files, and saves it to a temporary internet files directory. Save the file to a more accessible location.


**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

#### To import layout settings and pods into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any layouts that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Page Design > Layouts**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing layouts in the spreadsheet, and adds any new layouts with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

 To upload JavaScript files and HTML files, save the JavaScript or HTML file in a folder. Match the folder name with the Advanced Platform pod system name, as defined in the spreadsheet file for uploading the layouts and pods. Save the folder and the completed upload file to a zipped folder. Upload the zipped folder to import the layouts and pods, and JavaScript and HTML files to their associated Advanced Platform pods.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Layout Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each layout in the order listed below. For a description of layout settings and pod types, see the Creating Page Layouts and/or Available Pod Types topics in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Layouts

The Layouts worksheet contains the settings for the layouts being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a layout exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new layout is created.
<b>Display Name</b>	Any	If blank, the layout does not upload.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If blank, the layout is placed in the <b>Default</b> category.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Project Header Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Process Graphic Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Horizontal Alignment</b>	Left Center Right	If blank, the layout uploads with the default of <b>Left</b> .
<b>Background Color</b>	Valid hex color code	Can be blank and defaults to color code #ffffff.
<b>Margin Color</b>	Valid hex color code	Can be blank and defaults to color code #ffffff.
<b>Page Width</b>	Valid pixel values	Can be blank in which the layout uploads with the default of left aligned.
<b>Icon</b>	Valid alphanumeric icon id	If blank, the layout does not upload. Icon id value displays in icon selection dialog when <a href="#">creating layouts</a> .
<b>Has Master Button</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Layout Filters</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Fill Remaining Height</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add to New Gated Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add to New Non-Gated Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Add to New Idea Process Models</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Hide Action Menu</b>	Yes, Y, True, 1, X*	Applies to idea models only. All other values are treated as <b>No</b> on upload.
<b>Generate Global Link</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Configuration</b>	Valid access group display name	Separate each access group name using the pipe (   ) character.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Access Groups</b>		
<b>Layout Cycles</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Icon Color</b>	Valid hex color codes: #932121, #C76614, #10611E, #36297B, #A21E79, #417491 (blue, default)	All other values including blank are treated as #417491 on upload.
<b>Hide Hierarchy</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Pods

The Pods worksheet includes the individual pods and pod settings within the layouts being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Layout System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
<b>System Name</b>	Valid pod-specific system name	Used for matching on upload. If a pod exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new pod is created and added to the layout.
<b>Name</b>	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Type</b>	AdvancedPlatform Buttons Chart Documents Gates GlobalLinks HTMLReport Metric PlanningView Plugin PortfolioOptimization Productivity ProjectImage ProjectInformation QuickGrids Report ReportGroups TemplateImage Voting	<p>If a layout contains the <b>Advanced Platform</b> pod, Accolade downloads the JavaScript files and HTML files in individual file folder along with the spreadsheet file.</p> <p>Long string metrics with the <b>Rich Text</b> check box enabled are not supported in pods and cannot be imported.</p> <p>Can be blank.</p>
<b>Content</b>	Valid pod content name	<p>Do not include spaces between words and the content must be appropriate for the pod <b>Type</b>.</p> <p>Can be blank.</p>
<b>X</b>	Integer value greater than or equal to 0	<p>Determines where the pod displays horizontally in the layout.</p> <p>Coordinates (0,0) correlate to the top left corner of the layout.</p>
<b>Y</b>	Integer value greater than or equal to 0	<p>Determines where the pod displays vertically in the layout.</p> <p>Coordinates (0,0) correlate to the top left corner of the layout.</p>
<b>Height</b>	Integer value greater than 0	If blank or invalid, the pod does not upload.
<b>Width</b>	Integer value greater than 0	If blank or invalid, the pod does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Advanced Settings</b>	A valid expression	<p>Applies to pods with advanced settings.</p> <p>For example, note a Data Form pod with Project Name, Project ID, and Description selected and one column defined in the advanced settings as follows:</p> <pre>{   "Columns": 1,   "Items": [     {       "Order": null,       "IsReadOnly": false,       "ObjectTypeID": 2,       "SystemName": "ProjectName"     },     {       "Order": null,       "IsReadOnly": false,       "ObjectTypeID": 2,       "SystemName": "Description"     },     {       "Order": null,       "IsReadOnly": false,       "ObjectTypeID": 2,       "SystemName": "ProjectId"     }   ] }</pre> <p>If the expression is invalid, the row does not upload.</p>
<b>Plugin Type</b>	Valid configured plugin name	This setting only applies for pods containing plugins.
<b>Filter To Project</b>	Yes, Y, True, 1, X*	<p>This setting only applies to global link and planning view pods.</p> <p>All other values are treated as <b>No</b> on upload.</p>
<b>Title</b>		
<b>Text Alignment</b>	left right center	If blank, the pod uploads with the default of left aligned.
<b>Font Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.
<b>Font Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Content</b>		
<b>Font Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.
<b>Font Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Background Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.
<b>Vertical Bar color</b>	Valid hex color code	If blank, defaults to color code #054353.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Border</b>		
<b>Size</b>	Valid pixel values	If blank, defaults to a pixel size 11.
<b>Style</b>	none dotted dashed solid groove ridge inset outset	If blank, defaults to solid.
<b>Color</b>	Valid hex color code	If blank, defaults to color code #ffffff.
<b>Allow Maximization</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Comparison Set System Name</b>	Valid comparison set system name	Can be blank.

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

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- Comparison Set

The Comparison Set worksheet includes the comparison set settings within the layouts being uploaded or downloaded. This worksheet must be included in the spreadsheet file, but can be left blank if the layouts do not include comparison sets.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Layout System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a layout exists, its settings are changed with the values in the uploaded file.
<b>Comparison Set System Name</b>	Valid comparison set system name	Used for matching on upload. If a pod exists, its settings are changed with the values in the uploaded file.

Column Name	Accepted Values on Upload*	Additional Notes
		If a new, unique system name exists in the file when uploaded, a new set is created and added to the layout.
<b>Comparison Set Name</b>	Any	If blank, the set does not upload.

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## Importing and Exporting Reference Tables

Accolade provides Administrators and Process Designers the ability to export reference tables configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate reference tables in each environment, download the information and import into a different environment.

The download exports the reference tables configuration information into a spreadsheet file with the parts of the templates grouped into tabs.

### To download reference table settings:

1. From the **System** menu, select **Content Sources > Reference Tables**.
2. Select the reference tables you want to download.

To narrow the list by reference table name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all reference tables, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the reference tables into a zip file which contains a workbook file with all of the reference table system details, as well as an individual file folder containing each reference table spreadsheet, and saves it to a temporary internet files directory. Save the file to a more accessible location.

**Note:** The individual reference table spreadsheets **ONLY** contain column information required for the table configuration. The reference table data files must be downloaded and moved to the new environment manually.

### To import reference table settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reference tables that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Reference Tables**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the existing reference tables in the spreadsheet, and adds any new reference tables with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

## Reference Table Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the system settings for each reference table in the order listed below. For a description of each reference table setting, see the Adding Reference Tables topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Reference Table

Column Name	Accepted Values on Upload*	Additional Notes
Reference Table System Name	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new reference table is created.
Reference Table Display Name	Any	If blank, the reference table does not upload.
Unique Values in First Column	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
Description	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the reference table is placed in the <b>Default</b> category.
<b>Owner</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.  If blank, the owner defaults to <b>None</b> .
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.
<b>Available to Metrics</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Reporting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Portfolio Optimizer</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Maximum Number of Versions</b>	Any number	If blank, defaults to unlimited.
<b>Enable Automatic Loading</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Automatic Load Schedule Hours</b>	Valid hour in 24-hour time format	If <b>Enable Automatic Loading</b> is defined as <b>Yes</b> , a value can be entered or this field can be left blank. If blank, defaults to <b>Load immediately</b> .  If <b>Enable Automatic Loading</b> is defined as <b>No</b> , leave blank.
<b>Automatic Load Schedule Minutes</b>	Valid minutes in 24-hour time format	If <b>Enable Automatic Loading</b> is defined as <b>Yes</b> , a value can be entered or this field can be left blank. If blank, defaults to <b>Load immediately</b> .  If <b>Enable Automatic Loading</b> is defined as <b>No</b> , leave blank.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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



- Column Definition

Column Name	Accepted Values on Upload	Additional Notes
<b>Reference Table System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file.
<b>Column System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a column exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new reference table is created.
<b>Column Display Name</b>	Any	Used for matching in the upload.
<b>Number Format</b>	Alphanumeric characters	Can be blank.

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- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>Reference Table System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a reference table exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

# Importing and Exporting Access Groups

Accolade provides Administrators and Process Designers the ability to export access groups from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate access groups in each environment, download the information and import it into the new environment.

The download exports the access groups configuration information into a spreadsheet file with the parts grouped into tabs.

## To export access groups:

1. From the **System** menu, select **Security & Groups > Access Groups**.
2. Click **Download** in the top right corner of the page.

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

## To import access groups into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any access groups that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > Access Groups**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the access groups in the spreadsheet, and adds any new access groups with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

## Access Groups Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each access group in the order listed below. For a description of each access group setting, see the Creating Access Groups topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Access Group

Column Name	Accepted Values on Upload*	Additional Notes
<b>Access Group System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If an access group exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new access group is created.
<b>Access Group Name</b>	Any	If blank, the access group does not upload.
<b>Parent Access Group System Name</b>	Any	If blank, the access group does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

## Importing and Exporting Security Profiles

Accolade provides Administrators and Process Designers the ability to export security profiles from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate security profiles in each environment, download the information and import it into the new environment.

The download exports the security profiles configuration information into a spreadsheet file with the parts grouped into tabs.

### To export security profiles:

1. From the **System** menu, select **Security & Groups > Security Profiles**.
2. Select the security profiles you want to download.

To narrow the list by category, select a category to display in the **Category** list. To download all security profiles, select **All**.

3. Click **Download** in the top right corner of the page.

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

### To import security profiles into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any security profiles that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > Security Profiles**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the security profiles in the spreadsheet, and adds any new security profiles with unique system names.
5. *(Optional)* Click **Print** to print the import results for your records.

## Security Profiles Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each security profile in the order listed below. For a description of each security profile setting, see the Creating Security Profiles topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Security Profile Summary

Column Name	Accepted Values on Upload*	Additional Notes
<b>Security Profile System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new security profile is created.
<b>Security Profile Name</b>	Any	If blank, the security profile does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.
<b>Visible</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Classes

Column Name	Accepted Values on Upload*	Additional Notes
<b>Security Profile System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file.
<b>Class</b>	Valid class system name	Include separate row for each class. To allow access to all classes, leave this worksheet blank.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Metrics

Column Name	Accepted Values on Upload*	Additional Notes
<b>Security Profile System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a security profile exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	Must be a List, Multi-Select List, or String type and be associated with at least one model in a class selected in the security profile.
<b>Metric Value</b>	Any	
<b>Metric Extended Access</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

# Importing and Exporting Functional Areas and Functions

Accolade provides Administrators and Process Designers the ability to export functional areas and functions configuration from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate functional areas and functions in each environment, download the information and import it into the new environment.

The download exports the functional areas and functions configuration information into a spreadsheet file with the parts of the functions grouped into tabs.

## To export functional areas and functions:

1. From the **System** menu, select **Security & Groups > Functions**.
2. Click **Download** in the top right corner of the page.

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

## To import functional areas and functions into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any functional areas and functions that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Security & Groups > Functions**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the functional areas and functions in the spreadsheet, and adds any new functional areas and functions with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

# Functional Areas and Functions Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each functional area and function in the order listed below. For a description of each function setting, see the Creating Functional Areas and Functions topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Functional Areas

Column Name	Accepted Values on Upload*	Additional Notes
Functional Area System Name	Alphanumeric characters, underscore**	Used for matching for upload.  If a functional area exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new functional area is created.
Function Area Name	Any	If blank, the functional area does not upload.
Order	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
Delete Functional Area	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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- Functions

Column Name	Accepted Values on Upload*	Additional Notes
Functional Area System Name	Alphanumeric characters, underscore**	Used for matching for upload.  If a functional area exists, its settings are changed with the values in the uploaded file.
Function System Name	Alphanumeric characters, underscore**	Must be unique. If blank, the function does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Function Name</b>	Any	If blank, the function does not upload
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Merge To Functional System Name</b>	Alphanumeric characters, underscore**	Used for merging functions. Enter the system name of the function being merged to.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>Function System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a function exists, its settings are changed with the values in the uploaded file.
<b>Access Groups</b>	Valid access group system name	Include a separate row for each access group.

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

- Members

Column Name	Accepted Values on Upload	Additional Notes
<b>Function System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a function exists, its settings are changed with the values in the uploaded file.
<b>Members</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.  Include a separate row for each member.

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



# Importing and Exporting Accolade Charts

Accolade provides Administrators and Process Designers the ability to export charts settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate online charts in each environment, download the information and import into a different environment.

The download exports the chart configuration information into a spreadsheet file with the parts of the charts grouped into tabs.

## To export chart settings:

1. From the **System** menu, select **Content Source > Charts & Reports Manager**.
2. Select the charts and reports that you want to download.

To narrow the list by chart name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. Charts settings are downloaded to a workbook titled CHART\_Workbook.xlsx and reports are downloaded separately in a workbook titled RPT\_Workbook.xlsx. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

## To import chart settings into Accolade:

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**Important!** In order to successfully import a chart, the report source the chart is built upon must exist in the environment prior to upload.

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1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any charts that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Source > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'CHART\_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing charts in the spreadsheet, and adds any new charts with unique system names.

7. (Optional) Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Chart Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each chart in the order listed below. For a description of each chart setting, see the individual chart topic links in the Creating Charts from Report Data Overview topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- General Settings

The General Settings worksheet contains the settings for all charts being imported. The columns correlate to the specific chart configuration fields upon chart creation.

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Name</b>	Any	If blank, the chart does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Chart Type</b>	Sopheon.Accolade.Models.Domain.Charts.BarChart Sopheon.Accolade.Models.Domain.Charts.BubbleChart Sopheon.Accolade.Models.Domain.Charts.GroupedBarChart Sopheon.Accolade.Models.Domain.Charts.LineChartByColumns Sopheon.Accolade.Models.Domain.Charts.LineChartTrends Sopheon.Accolade.Models.Domain.Charts.PieChart Sopheon.Accolade.Models.Domain.Charts.StackedBarChart Sopheon.Accolade.Models.Domain.Charts.RadarChart	If blank, the chart does not upload.
<b>Report Source</b>	Valid online report system name	If blank, the chart does not upload.
<b>Display Title</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the chart is placed in the <b>Default</b> category.
<b>Description</b>	Any	Can be blank.
<b>Owners</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com. Separate each additional owner with a pipe (   ) character.  If blank, the chart does not upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Roles</b>	Valid Accolade user role	Separate each role with a pipe (   ) character. Can be blank.
<b>Available to Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Bar Chart

The Bar Chart worksheet contains the settings for the bar charts being imported. The columns correlate to the specific [bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Grouping</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Grouping Axis Label</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Bar</b>	Valid report column system name	If blank the chart does not upload.
<b>Display Bar Axis Label</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Display Type</b>	Vertical Horizontal	If blank, the value defaults to <b>Vertical</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Target Line Report Source</b>	Valid online report system name	Can be blank.
<b>Target Line Report Key</b>	Valid report column system name	Can be blank.
<b>Target Line Report Value</b>	Valid report column system name	Can be blank.
<b>Number Format Horizontal</b>	#, (#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#, (#)</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Axis</b>		
<b>Number Format Bars</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Display Totals</b>	Vertical Horizontal	Can be blank.

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

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- Pie Chart

The Pie Chart worksheet contains the settings for the pie charts being imported. The columns correlate to the specific [pie chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Slice Represents</b>	Valid report column system name	If blank, the chart does not upload.
<b>Slice Size</b>	Valid report column system name	If blank, the chart does not upload.
<b>Slice Name</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Slice Value</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Slice Percentage</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Doughnut</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Exploded</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Number Format</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.

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

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- Bubble Chart

The Bubble Chart worksheet contains the settings for the bubble charts being imported. The columns correlate to the specific [bubble chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Horizontal Axis</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Horizontal Axis Label</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show Horizontal Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Horizontal Axis Scale</b>	Automatic Custom	If blank, defaults to <b>Automatic</b> .
<b>Horizontal Axis Range Min</b>	Any number	If <b>Horizontal Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range minimum value. Otherwise leave blank.
<b>Horizontal Axis Range Max</b>	Any number	If <b>Horizontal Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range maximum value. Otherwise leave blank.
<b>Vertical Axis</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Vertical Axis Label</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show Vertical Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Vertical Axis Scale</b>	Automatic Custom	If blank, defaults to <b>Automatic</b> .



Column Name	Accepted Values on Upload*	Additional Notes
<b>Vertical Axis Range Min</b>	Any number	If <b>Vertical Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range minimum value. Otherwise leave blank.
<b>Vertical Axis Range Max</b>	Any number	If <b>Vertical Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range maximum value. Otherwise leave blank.
<b>Bubble Size</b>	Valid report column system name	If blank, the chart does not upload.
<b>Bubble Represents</b>	Valid report column system name	Can be blank.
<b>Bubble Color</b>	Valid report column system name	Can be blank.
<b>Bubble Opacity</b>	0.1 0.2 0.3 0.4 0.5 0.6 0.7 0.8 0.9	If blank, the chart does not upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5 All the same color	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Number Format Horizontal Axis</b>	#, (#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#, (#)</b> on upload.
<b>Number Format Vertical Axis</b>	#, (#) #,###;(#,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#, (#)</b> on upload.
<b>Number Format Bubble Size</b>	#, (#) #,###;(#,###) \$#,###;(\$#,###)	Indicates how values within the bubble's tooltips are displayed.  If blank, the value defaults to <b>#, (#)</b> on upload.

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

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- Grouped Bar Chart

The Grouped Bar Chart worksheet contains the settings for the grouped bar charts being imported. The columns correlate to the specific [grouped bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Horizontal Column</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Grouping Label Horizontal</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Bars</b>	Valid report column system name	Separate each additional bar with a pipe (   ) character.  If Vertical Column has a value, then only one bar segment allowed.  If blank, the chart does not upload.
<b>Bar Axis Units</b>	Any	Can be blank.
<b>Display Type</b>	Vertical Horizontal	If blank, the value defaults to <b>Vertical</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Number Format Bars</b>	#;(#) #,###;(#,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed.  If blank, the value defaults to <b>#;(#)</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Target Line Report Source</b>	Valid online report system name	Can be blank.
<b>Target Line Report Key</b>	Valid report column system name	Can be blank.
<b>Target Line Report Value</b>	Valid report column system name	Can be blank.
<b>Vertical Column</b>	Valid report column system name	Can be blank.
<b>Display Grouping Label Vertical</b>	Yes, Y, True, 1, X*	Can be blank.
<b>Number Format Horizontal Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Number Format Vertical Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

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

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- Stacked Bar Chart

The Stacked Bar Chart worksheet contains the settings for the stacked bar charts being imported. The columns correlate to the specific [stacked bar chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Horizontal Column</b>	Valid report column system name	If blank, the chart does not upload.
<b>Display Axis Label</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Horizontal</b>		
<b>Bar Segments</b>	Valid report column system name	Separate each bar with a pipe (   ) character. If Vertical Column has a value, then only one bar segment allowed. If blank, the chart does not upload.
<b>Stacked to 100%</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Display Totals</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Bar Axis Units</b>	Any	Can be blank.
<b>Display Type</b>	Vertical Horizontal	If blank, the value defaults to <b>Vertical</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Number Format Bars</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	Indicates how values within the chart are displayed. If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Target Line Report Source</b>	Valid online report system name	Can be blank.
<b>Target Line Report Key</b>	Valid report column system name	Can be blank.
<b>Target Line Report Value</b>	Valid report column system name	Can be blank.
<b>Vertical Column</b>	Valid report column system name	Can be blank.
<b>Display Axis Label Vertical</b>	Yes, Y, True, 1, X*	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Number Format Horizontal Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Number Format Vertical Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

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

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- Radar Chart

The Radar Chart worksheet contains the settings for the radar charts being imported. The columns correlate to the specific [radar chart configuration fields](#).

Column Name	Accepted Values on Upload	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a chart exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Polygons</b>	Valid report column system name	If blank, the chart does not upload.
<b>Spokes</b>	Valid report column system name	Separate each spoke with a pipe (   ) character. If blank, the chart does not upload.
<b>Spoke Axis Scale</b>	Automatic Custom	If blank, defaults to <b>Automatic</b> .
<b>Spoke Axis Range Min</b>	Any number	If <b>Spoke Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range minimum value. Otherwise leave blank.
<b>Spoke Axis Range Max</b>	Any number	If <b>Spoke Axis Scale</b> is defined as <b>Custom</b> , enter a value for the chart range maximum value. Otherwise leave blank.
<b>Number Format</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

Column Name	Accepted Values on Upload	Additional Notes
<b>Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Opacity</b>	0.1 0.2 0.3 0.4 0.5 0.6 07 0.8 0.9 1	If <b>Lines Only</b> is selected as the style, set the opacity to <b>1</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

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- Line Chart by Columns Chart

The Line Chart by Columns Chart worksheet contains the settings for the line charts being imported. The columns correlate to the specific [line chart by columns chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Lines</b>	Valid report column system name	If blank, the chart does not upload.
<b>Horizontal Axis Title</b>	Alphanumeric characters	Can be blank.
<b>Show Horizontal</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Grid Lines</b>		
<b>Columns</b>	Valid report column system name	Separate column names using a pipe (   ) character. If blank, the chart does not upload.
<b>Vertical Axis Title</b>	Alphanumeric characters	Can be blank.
<b>Show Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Display Point Marker</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.
<b>Number Format Horizontal Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Number Format Vertical Axis</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.

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

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- Line Chart Trends Chart

The Line Chart Trends Chart worksheet contains the settings for the line series charts being imported. The columns correlate to the specific [line chart trends chart configuration fields](#).

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a chart exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new chart is created.
<b>Horizontal Axis Label</b>	Alphanumeric characters	Can be blank.
<b>Rotate Horizontal Axis Text</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Show Horizontal Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Start at Zero</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Horizontal Number Format</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Horizontal Axis Columns</b>	Valid report column system name	If blank, the chart does not upload.
<b>Vertical Axis Label</b>	Alphanumeric characters	Can be blank.
<b>Show Vertical Grid Lines</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Vertical Number Format</b>	#;(##) #,###;(##,###) \$#,###;(\$#,###)	If blank, the value defaults to <b>#;(##)</b> on upload.
<b>Vertical Axis Columns</b>	Valid report column system name	Separate column names using a pipe (   ) character. If blank, the chart does not upload.
<b>Group By Columns</b>	Valid report column system name	Separate column names using a pipe (   ) character. If blank, the chart does not upload.
<b>Display Point Marker</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Line Style</b>	Lines Only Lines and Fill Fill Only	If blank, the value defaults to <b>Lines Only</b> on upload.
<b>Legend</b>	None Right Left	If blank, the value defaults to <b>None</b> on upload.
<b>Color Theme</b>	Theme 1 Theme 2 Theme 3 Theme 4 Theme 5	If blank, the value defaults to <b>Theme 1</b> on upload.

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

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- Access Groups

The Access Groups worksheet includes the access groups for the charts being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
<b>Chart System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a chart exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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- Cycles

The Cycles worksheet includes the chart cycles for the charts being uploaded or downloaded. The columns correlate to [specific chart types](#) to cycle through.

Column Name	Accepted Values on Upload	Additional Notes
<b>Chart System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.

Column Name	Accepted Values on Upload	Additional Notes
		<p>If a chart exists, its settings are referenced in the uploaded file.</p> <p>If blank, no cycles upload.</p>
<b>Chart Type</b>	Sopheon.Accolade.Models.Domain.Charts.BarChart Sopheon.Accolade.Models.Domain.Charts.BubbleChart Sopheon.Accolade.Models.Domain.Charts.GroupedBarChart Sopheon.Accolade.Models.Domain.Charts.LineChartTrends Sopheon.Accolade.Models.Domain.Charts.PieChart Sopheon.Accolade.Models.Domain.Charts.StackedBarChart	<p>If blank, the referenced chart does not upload.</p>
<b>Cycles</b>	References columns in the charts that are designated as a cycle.	<p>Used for matching for upload.</p> <p>If chart settings exist, the referenced chart is in the upload file.</p> <p>If blank, no cycles upload.</p>

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

# Importing and Exporting HTML Reports

Accolade provides Administrators and Process Designers the ability to export HTML reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate HTML reports in each environment, download the information and import into a different environment.

The download exports the HTML reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

## To export report settings:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Select the HTML reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. HTML report settings are downloaded to a workbook titled HTML\_Workbook.xlsx. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

## To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'HTML\_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## HTML Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Creating HTML Reports topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- HTML Report

The HTML Report worksheet contains the settings for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
HTML Report System Name	Alphanumeric characters, underscore**	Used for matching in the upload.  If a report exists, its settings are changed with the values in the uploaded file.  If it is new, a unique system name exists in the file when uploaded, a new report is created.
HTML Report Display Name	Any	If blank, the report does not upload.
Description	Any	Can be blank.
Category	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the report is placed in the <b>Default</b> category.
Query	Valid query system name	If blank, the report does not upload.
Transpose	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
Active in Charts &	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Reports</b>		
<b>Active in Projects</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Required Notifications

The Required Notifications worksheet includes the notification settings of the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
<b>HTML Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
<b>Notification</b>	Show Hide Required	If blank, report does not upload.
<b>Notification Day</b>	Monday Tuesday Wednesday Thursday Friday Saturday Sunday	If <b>Notification</b> is set to <b>Required</b> , at least one valid day of the week must be entered. Include a separate row for each day. Otherwise, leave blank.

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

- Roles

The Roles worksheet includes the roles restriction settings of the report being uploaded or downloaded. The values can be blank, resulting in a report uploaded that does not contain role restrictions.

Column Name	Accepted Values on Upload	Additional Notes
<b>HTML Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
<b>Roles</b>	Valid Accolade user role	Include a separate row for each role. Can be blank.

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

- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
<b>HTML Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting MS Excel Reports

Accolade provides Administrators and Process Designers the ability to export MS Excel reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate MS Excel reports in each environment, download the information and import into a different environment.

The download exports the MS Excel reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

### To export report settings:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Select the MS Excel reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. MS Excel report settings are downloaded to a workbook titled EXCEL\_Workbook.xlsx. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

### To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'EXCEL\_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.



## MS Excel Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Adding MS Excel Reports to Accolade topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Excel Report

The Excel Report worksheet contains the settings for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload*	Additional Notes
<b>MS Excel Report System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a report exists, its settings are changed with the values in the uploaded file.  If it is new, a unique system name exists in the file when uploaded, a new report is created.
<b>MS Excel Report Display Name</b>	Any	If blank, the report does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the report is placed in the <b>Default</b> category.
<b>Query Worksheet 1-5</b>	Valid query system name	Can be blank.
<b>Active Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Active Projects</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Template</b>	Valid template system name of a template available in the Template Library	Template must be uploaded prior to being added to the report.  If blank, the report does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

The Roles worksheet includes the roles restriction settings of the reports being uploaded or downloaded. The values can be blank, resulting in a report uploaded that does not contain role restrictions.

Column Name	Accepted Values on Upload	Additional Notes
<b>MS Excel Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
<b>Roles</b>	Valid Accolade user role	Include a separate row for each role. Can be blank.

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

- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
<b>MS Excel Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

# Importing and Exporting Accolade Online Reports

Accolade provides Administrators and Process Designers the ability to export Accolade online reports settings and configuration from one Accolade environment and import them into another Accolade environment. For example, your company may have separate test and production environments or company branches hosted in separate Accolade instances. Instead of having to recreate online reports in each environment, download the information and import into a different environment.

The download exports the online reports configuration information into a spreadsheet file with the parts of the reports grouped into tabs.

## To export report settings:

1. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
2. Select the reports that you want to download.

To narrow the list by report name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all charts and reports, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads all configured charts and reports in four separate spreadsheet files within a zip file, and saves it to a temporary internet files directory. Online report settings are downloaded to a workbook titled RPT\_Workbook.xlsx. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

## To import report settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any reports that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Charts & Reports Manager**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load. The file name must be prefixed with 'RPT\_' in order to successfully upload.
6. Click **Upload File**.

Accolade uploads the changes to the existing reports in the spreadsheet, and adds any new reports with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Online Report Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings and filters for each report in the order listed below. For a description of each report setting, see the Creating Online Reports within Accolade topic in the online Help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Report Settings

The Report Settings worksheet contains the settings for the reports being imported.

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload.  If a report exists, its settings are changed with the values in the uploaded file.  If it is new, a unique system name exists in the file when uploaded, a new report is created.
<b>Display Name</b>	Any	If blank, the report does not upload.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the report is placed in the <b>Default</b> category.
<b>Subject System Name</b>	Valid report subject system name	Used for matching for upload.  If the <b>Subject System Name</b> specifies <b>Project Snapshot History</b> , a value must be entered in the <b>Is Snapshot</b> field on the Columns and Filters worksheet.  If blank, the report does not upload.
<b>Owner</b>	Valid user system ID	Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.

Column Name	Accepted Values on Upload*	Additional Notes
		<p>If you are uploading a new report, the downloaded file can be changed to a new owner in order to transfer initial ownership when loading the file. If this field is left blank or has an invalid user ID entered, the system will assign the user completing the upload as the owner of the report.</p> <p>If you are making changes to an existing report via upload, the <b>Owner</b> column is ignored and will not update.</p> <p>💡 If a downloaded report was created by a user that has been deleted, this file will reflect <b>[None]</b> as the report owner.</p>
<b>Additional Owners</b>	Valid user system ID	<p>Use the format with which the user accessed Accolade, such as domain\username or username@domain.com.</p> <p>Separate each additional owner by a pipe (   ) character.</p> <p>Can be blank.</p>
<b>Roles</b>	Valid Accolade user role	<p>Separate each role by a pipe (   ) character.</p> <p>Can be blank.</p>
<b>Description</b>	Any	Can be blank.
<b>Override Project Filtering</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Export Days</b>	Integers	Can be blank.
<b>Export Time</b>	Time value in	Can be blank.
<b>Export File Path</b>	Valid file path for the export to	Can be blank.
<b>Export File Name</b>	Alphanumeric characters, underscore**	Can be blank.
<b>Export Include Timestamp</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Export File Type</b>	Excel CSV	If blank, the setting defaults to <b>Excel</b> .
<b>Available to Charts &amp; Reports</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Available to Configuration</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Transpose</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Columns and Filters

The Columns and Filters worksheet includes the report column settings of the reports being imported.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
<b>Unique Group System Name</b>	Valid reference table system name Valid matrix system name	Can be blank if <b>Reporting Column Type</b> is defined as <b>Standard</b> or <b>Metric</b> .
<b>Reporting Column Type</b>	Standard Reference Table Metric Matrix Calculated	The value is related to the <b>Reporting Data Type</b> value, and must match in terms of appropriate data types. If blank, the report does not upload.
<b>Reporting Data Type</b>	String Image List Number Date Boolean ID Multilist	The value is related to the <b>Reporting Column Type</b> value, and must match the column type. If blank, the report does not upload.
<b>Column System Name</b>	Valid report column-specific system name**	Used for matching for upload. If a report column exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new column is created.
<b>Display</b>	Any	Can be blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Name</b>		
<b>Sort Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Sort Ascending</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Property</b>	Aggregation Method None Avg Min Max StDev Sum Date Mask Excel Dates Days Months Quarters Years Link	Link is only available for the Project Name report column.  Can be blank.
<b>Column Order</b>	Any number	Must be a unique value for each column included in a report.
<b>Display Column On Report</b>	Yes, Y, True, 1, X*	Set the value to <b>No, N, False, 0</b> if the column is only used as a filter and not a report column. Otherwise, set the value to <b>Yes, Y, True, 1, X</b> and specify the <b>Filter ID</b> if applicable.  All other values are treated as <b>No</b> on upload.
<b>Filter ID</b>	Any number	Must be a unique value for each filter included in a report.  Can be blank if the report does not include filters and the <b>Display Column On Report</b> is set to <b>Yes</b> .

Column Name	Accepted Values on Upload*	Additional Notes
<b>Filter Type</b>	equal not equal greater than less than greater than or equal to less than or equal to is empty is not empty between contains does not contain is one of between days between dates days before days after	If a <b>Filter ID</b> is specified, the <b>Filter Type</b> must be defined. and values must be entered on the Filter Values worksheet.  Can be blank if the report does not include filters and the <b>Display Column On Report</b> is set to <b>Yes</b> .
<b>Is Snapshot</b>	Yes, Y, True, 1, X*	If the <b>Subject System Name</b> on the Report Settings worksheet is set to <b>Project Snapshot History</b> , this field determines if the metric or matrix is part of the snapshot, and must have a value entered. Otherwise, can be blank.  All other values are treated as <b>No</b> on upload.
<b>Is Link</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Formula</b>	A valid expression	If <b>Reporting Column Type</b> is defined as <b>Calculated</b> , the <b>Formula</b> must be defined for the calculated column.  Otherwise, can be blank.
<b>Data Format</b>	<i>For columns containing dates:</i>  Days Months Quarters Years Excel Dates Timestamp  <i>For columns containing numbers:</i>  #;(##)	<b>Data Format</b> only applies for columns that contain date or number values and specifies how the data displays when the report is run. <ul style="list-style-type: none"> <li>• <b>Date columns</b> - If blank, the value defaults to <b>Excel Dates</b> on upload.</li> <li>• <b>Number columns</b> - If blank, the value defaults to <b>#;(##)</b> on upload.</li> </ul>



Column Name	Accepted Values on Upload*	Additional Notes
	#,###,(#,###) \$#,###;(\$#,###)	
<b>Show</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Filter Values

The Filters Values worksheet includes the values of the filters defined on the reports being imported. This worksheet can be blank if the reports do not include filters.

Column Name	Accepted Values on Upload	Additional Notes
<b>Filter ID</b>	Any number	Used for matching for upload.  If a filter exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new filter is created.  Can be blank if the report does not include filters.
<b>Filter Value Rank</b>	Any number	Can be blank if only one filter is included in the report.
<b>Filter Value Type</b>	Text Field code Metadata Metric Current User	If the report includes filters and this field is blank, the filter does not upload.
<b>Filter Value</b>	Valid metric system name or field code	If the <b>Filter Type</b> on the Columns and Filters worksheet is defined as <b>is one of</b> , separate the metric or field code system name values with a pipe (   ) character.  If the <b>Filter Type</b> on the Columns and Filters worksheet is defined as <b>between</b> , the worksheet includes additional rows for each filter value. Additionally, concatenate an integer to the field code system name to further specify the field code. For example, a gate date field code would include an integer to specify if it is referencing gate date 1, 2, 3, etc.  Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Filter Runtime Filter</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

- Access Groups

The Access Groups worksheet includes the access groups for the reports being uploaded or downloaded.

Column Name	Accepted Values on Upload	Additional Notes
<b>Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

- Matrix Join Definitions

The Matrix Join Definitions worksheet includes the join definitions for reports being uploaded or downloaded that include multiple matrices. This worksheet can be blank if the reports do not include multiple matrices.

Column Name	Accepted Values on Upload	Additional Notes
<b>Report System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a report exists, its settings are changed with the values in the uploaded file.
<b>Source Matrix System Name</b>	Valid matrix system name	Used for matching for upload. Cannot be the same matrix referenced in the <b>Target Matrix System Name</b> field. If the report contains matrices and this field is blank or invalid, the definition does not upload.
<b>Source Matrix Metric System Name</b>	Valid matrix metric system name	Must be a metric that is included in the matrix defined in the <b>Source Matrix System Name</b> field. If this field is blank or invalid, the definition does not upload.

Column Name	Accepted Values on Upload	Additional Notes
<b>Target Matrix System Name</b>	Valid matrix system name	Used for matching for upload. Cannot be the same matrix referenced in the <b>Source Matrix System Name</b> field. If the report contains matrices and this field is blank or invalid, the definition does not upload.
<b>Target Matrix Metric System Name</b>	Valid matrix metric system name	Must be a metric that is included in the matrix defined in the <b>Target Matrix System Name</b> field. If this field is blank or invalid, the definition does not upload.

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

## Importing and Exporting Queries

Accolade provides Administrators and Process Designers the ability to export queries from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate queries in each environment, download the information and import it into the new environment.

The download exports the query configuration information into a spreadsheet file with the parts of the query grouped into tabs.

### To export queries:

1. From the **System** menu, select **Content Sources > Queries**.
2. Select the queries that you want to download.

To narrow the list by query name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all queries, select **All**.

3. Click **Download** in the top right corner of the page.

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

### To import queries into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any queries that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Queries**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the queries in the spreadsheet, and adds any new queries with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Queries Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each query in the order listed below. For a description of each query setting, see the Adding Database Queries topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Queries

Column Name	Accepted Values on Upload	Additional Notes
Query System Name	Alphanumeric characters, underscore**	Used for matching for upload.  If a query exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new query is created.
Query Name	Any	If blank, the query does not upload.
Description	Any	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If blank, the query is placed in the <b>Default</b> category.
<b>SQL</b>	Valid query	Enter the query code.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>Query System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a query exists, its settings are changed with the values in the uploaded file.
<b>Access Groups</b>	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting Metrics

Accolade provides Administrators and Process Designers the ability to export metrics from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate metrics in each environment, download the information and import it into the new environment.

The download exports the metrics configuration information into a spreadsheet file with the parts grouped into tabs.

### To export metric settings:

1. From the **System** menu, select **Content Sources > Metrics**.
2. Select the metrics that you want to download.

Use the **Metric ID** search field to find the metrics you wish to download. A partial search entry pulls up a list of all matching metric IDs containing those numeric characters.

You can also enter a category, name, and/ or system name when searching by metric ID to find the metrics that match all criteria entered. These filters are case insensitive.

To narrow the list by metric name or system name, add the criteria to filter by in the appropriate filter text box.

To narrow the list by category, select a category to display in the **Category** list. To download all metrics, select **All**.

3. Click **Download** in the top right corner of the page.

Accolade downloads the metrics to a spreadsheet file and saves it to a temporary internet files directory. Save the file to a more accessible location.

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

### To import metric settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any metrics that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Metrics**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.

Accolade uploads the changes to the metrics in the spreadsheet, and adds any new metrics with unique system names.

6. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Metric Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each metric in the order listed below. For a description of each metric setting, see the Creating Metrics topic in the online help.


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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Metrics

If you want to import metric settings without associating the metric to a process model, complete this section of the spreadsheet only. You will need to include the [Additional Model Settings](#) columns listed below, but they can be left blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a metric exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new metric is created.
<b>Display Name</b>	Any	If blank, the metric does not upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Metric ID</b>	<i>(Read Only)</i> The metric ID is included in the download file, but is not editable on upload.	
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created. If left blank, the metric is placed in the <b>Default</b> category.
<b>Data Type</b>	String Number Date List Long String Multi-Select List	Can only upload changes for rows that create new metrics. Existing metrics must match their <b>Data Type</b> along with <b>System Name</b> and <b>Display Name</b> .   If the <b>Data Type</b> selected is <b>List</b> or <b>Multi-Select List</b> and the list is manually defined within the metric, enter the list values on the <a href="#">List Values</a> spreadsheet tab.
<b>Decimal Places</b>	Any number	Applies only to Number type metrics. Is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Is Filter</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Is Matrix</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Reporting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Available to Portfolio</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Optimizer</b>		
<b>Available to Planning</b>	Yes, Y, True, 1, X*	This setting is only changeable on upload if the setting on download is <b>No</b> . All other values are treated as <b>No</b> on upload.
<b>Milestone Shape</b>	Arrow Bar Checkmark InvertedTriangle Marker Pin Rocket Starburst Target	Applies only to Date type metrics that have <b>Available to Planning</b> selected as <b>Yes</b> . If blank, defaults to <b>InvertedTriangle</b> .
<b>Available to Resource Editor</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Is Inherited</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Is Calculated</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Calculated Expression</b>	A valid expression	Applies only to metrics with <b>Is Calculated</b> set to <b>Yes</b> .  The row does not upload if the expression is invalid.
<b>Calculated Event Triggers</b>	AssociatedChange ProjectCreate ProjectMigrate ProjectClose ProjectReOpen	Applies only to metrics with <b>Is Calculated</b> set to <b>Yes</b> .  To apply more than one trigger, separate events using a pipe (   ) character.  If the metric value is invalid, the trigger will not be assigned.
<b>Calculated Timed Triggers</b>	Daily Weekly Monthly EndOfMonth Quarterly Yearly	Applies only to metrics with <b>Is Calculated</b> set to <b>Yes</b> .  Use the format <type>;<yyyy/MM/dd> <hh:mm:ss>  For example, Daily;2018/06/18 10:00:00.  Only one interval of the same type may be assigned. If more than one interval is uploaded the first displayed will be set. For example, two-day events cannot be assigned, but day and month can be assigned.



Column Name	Accepted Values on Upload*	Additional Notes
		<p>To apply more than one trigger, separate timed events using a pipe (   ) character.</p> <p>Timed event accepted values use international dates, and 24 hour times.</p> <p>EndOfMonth dynamically changes based on the date each month falls on.</p> <p>If the metric value is invalid, the trigger will not be assigned.</p>
<b>Initialized From</b>	Valid metric system name	The row does not upload if the indicated system name is not a valid system name for an existing metric.
<b>Metric Query</b>	Valid SQL query expression	<p>Applies only to List and Multi-Select List metrics that use a query to determine the list values.</p> <p>The row does not upload if the expression is invalid.</p>
<b>Office Format</b>	#, 0	Applies only to Number type metrics in Microsoft Word or PowerPoint.
<b>Track History</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Reference Table</b>	Valid reference table system name	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
<b>Reference Table Column</b>	Valid column system name within the table	Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.
<b>Reference Table Constraints</b>	Valid reference table column value or valid query code	<p>Applies only to List and Multi-Select List metrics that use a reference table column to determine the list values.</p> <p>Separate list items using a pipe (   ) character.</p>
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Milestone Shape Color Metric System Name</b>	Valid metric system name	<p>Applies only to Date type metrics that have <b>Available to Planning</b> selected as <b>Yes</b>.</p> <p>The row does not upload if the indicated system name is not a valid system name for an existing metric.</p> <p>If blank, defaults to <b>[None]</b>.</p>
<b>Restrict to These Roles</b>	Valid Accolade user role	Separate roles using a pipe (   ) character.
<b>Allow Updates</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
from All My Work page		
Available to Workflow Lineup	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
Configuration Access Groups	Valid access group display name	Separate access groups using a pipe (   ) character.
Available to BI	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
Available to Search	Yes, Y, True, 1, X*	Applies only to String, Long String, and Multi-Select List metrics. All other values are treated as <b>No</b> on upload.
Rich Text	Yes, Y, True, 1, X*	Applies only to Long String metrics. All other values are treated as <b>No</b> on upload.
Delete	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

In addition, the Metrics spreadsheet includes the association setting for each process models (active and inactive) to which each metric is associated. Each process model to which the metric is associated contains the following set of columns, and each set of columns is identified by the process model name.

- Additional Model Settings

For a description of each metric association setting, see the Associating Metrics to Models topic in the online Help.

**Note:** The columns in this portion of the spreadsheet are used for associating a metric with a model, and do not create new process models in Accolade.

Column Name	Accepted Values on Upload	Additional Notes
Associated	Yes, Y, True, 1, X*	This column defaults to <b>Yes</b> if any of the related model columns are defined. All other values are treated as <b>No</b> on upload.
Project Creation	Edit Show	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Project Metrics</b>	Edit Show	Can be blank.
<b>Status Report</b>	Edit Show	Can be blank.
<b>Portfolio</b>	Edit Show	Can be blank.
<b>Planning Favorite</b>	Yes, Y, True, 1, X*	The <b>Available to Planning</b> column for the metric must be set to <b>Yes, Y, True, 1, X*</b> if this column is set to <b>Yes, Y, True, 1, X*</b> . All other values are treated as <b>No</b> on upload.
<b>Milestone</b>	Yes, Y, True, 1, X*	Applies only to Date type metrics. The <b>Available to Planning</b> column on the metric must be set to <b>Yes, Y, True, 1, X*</b> if this column is set to <b>Yes, Y, True, 1, X*</b> . All other values are treated as <b>No</b> on upload.
<b>Required</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

- List Values

If the **Data Type** selected is **List** or **Multi-Select List** and the list is manually defined within the metric, the list values should be entered on this tab. For a description of each list value setting, see the Creating Single and Multi-Select List Metrics topic in the online help.

This worksheet must be included in the spreadsheet file, but can be left blank if the metrics do not include defined lists.

Column Name	Accepted Values on Upload	Additional Notes
<b>Metric System Name</b>	Alphanumeric characters, underscore**	Used for matching in the upload. If a metric exists, its settings are changed with the values in the uploaded file.
<b>List Value Name</b>	Any	If blank, the list value does not upload.
<b>List Value System Name</b>	Alphanumeric characters, underscore**	Can be blank.

Column Name	Accepted Values on Upload	Additional Notes
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Color</b>	Valid hex color code	Can be blank.

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

## Importing and Exporting Matrices

Accolade provides Administrators and Process Designers the ability to export matrices from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate matrices in each environment, download the information and import it into the new environment.

The download exports the matrices configuration information into a spreadsheet file with the parts grouped into tabs.

### To export matrices:

1. From the **System** menu, select **Content Sources > Matrices**.
2. Select the matrices that you want to download.

To narrow the list by matrix name or system name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list. To download all matrices, select **All**.

3. Click **Download** in the top right corner of the page.

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

**Note:** Only components to which you have view and/or edit configuration access group rights will download. Components you can only view may be included in the file, but you can only upload changes to areas to which you have explicit edit permission.

### To import matrices into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any matrices that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Content Sources > Matrices**.

4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the matrices in the spreadsheet, and adds any new matrices with unique system names.

7. *(Optional)* Click **Print** to print the import results for your records.

**Note:** Components that are imported are subject to group configuration rules. The user may assign components in a way that the configuration access groups are not consistent. This behavior is not allowed in the UI, and mismatches in either the user's access rights or the component's access group restrictions may result in warning or error messages during the upload, and may result in an incomplete upload.

## Matrix Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each matrix in the order listed below. For a description of each matrix setting, see the [Creating Matrices](#) topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing [Importing and Exporting Configuration Best Practices](#) in the online help before making changes in a production environment.

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- Details

Column Name	Accepted Values on Upload*	Additional Notes
<b>Matrix System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload.  If a matrix exists, its settings are changed with the values in the uploaded file.  If a new, unique system name exists in the file when uploaded, a new matrix is created.
<b>Matrix Name</b>	Any	If blank, the matrix does not upload.
<b>Description</b>	Any	Can be blank.
<b>Category</b>	Alphanumeric characters	If a new, unique category name exists in the file when uploaded, a new category is created.  If left blank, the matrix is placed in the <b>Default</b> category.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Available to Reporting</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Portfolio Optimizer</b>	Not Available Reporting Only Edit	If blank, the matrix does not upload.
<b>Available to BI</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload. The workflow cannot be deleted if in use.

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

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

- Metrics

Column Name	Accepted Values on Upload	Additional Notes
<b>Matrix System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
<b>Metric System Name</b>	Valid metric system name	If blank, the metric does not upload.
<b>Category</b>	The metric's category	If blank, the metric does not upload.
<b>Data Type</b>	The metric's datatype	If blank, the metric does not upload.
<b>Unique</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload. Multi-select lists and calculated metrics within the matrix cannot be set as unique.
<b>Portfolio Header Columns</b>	Any number	Can be blank.
<b>Filterable</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Portfolio Optimizer Filter Values</b>	Valid list value for the metric	Separate each filter value with a pipe (   ) character.

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

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

- Models

Column Name	Accepted Values on Upload*	Additional Notes
<b>Matrix System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
<b>Model</b>	Valid process model system name	If blank, matrix does not upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Access Groups

Column Name	Accepted Values on Upload	Additional Notes
<b>Matrix System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a matrix exists, its settings are changed with the values in the uploaded file.
<b>Access Group</b>	Valid access group system name	Include a separate row for each access group.

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

## Importing and Exporting Extended Fields

Accolade provides Administrators and Process Designers the ability to export custom details, called extended fields, from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate extended fields in each environment, download the information and import it into the new environment.

The download exports the extended fields configuration information into a spreadsheet file with the parts grouped into tabs.

#### To export extended fields:

1. From the **System** menu, select **Configuration > Extended Fields**.
2. Click **Download** in the top right corner of the page.

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

#### To import extended fields into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any extended fields that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Configuration > Extended Fields**.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the extended fields in the spreadsheet.

7. *(Optional)* Click **Print** to print the import results for your records.

## Extended Fields Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each extended field in the order listed below. For a description of each extended field setting, see the Adding Custom Details Throughout Accolade topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Extended Fields

Column Name	Accepted Values on Upload*	Additional Notes
<b>Extended Field System Name</b>	Valid extended field system name	Used for matching for upload. If an extended field exists, its settings are changed with the values in the uploaded file. If invalid, the extended field does not upload.
<b>Extended Field Name</b>	Any	If blank, the extended field does not upload.



Column Name	Accepted Values on Upload*	Additional Notes
<b>Extended Field ID</b>	Valid system field ID	If blank, the extended field does not upload.
<b>Datatype</b>	Date Fields List Fields Long String Fields Multi-Select List Fields Number Fields String Fields	If blank, the extended field does not upload.
<b>Query</b>	Valid query in Accolade	Either <b>Query</b> or <b>Defined List</b> must be entered if the <b>Data Type</b> is a <b>List Field</b> or <b>Multi-List Field</b> . If not a list field, leave blank.
<b>Defined List</b>	Any	Separate list items using the pipe (   ) character. Either <b>Query</b> or <b>Defined List</b> must be entered if the <b>Data Type</b> is a <b>List Field</b> or <b>Multi-List Field</b> . If not a list field, leave blank.
<b>Activities</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Deliverables</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Pools</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Timesheets</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>User Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>User Required</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>User Searchable</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.

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

## Importing and Exporting Project Link Types

Accolade provides Administrators and Process Designers the ability to export link types from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to recreate link types in each environment, download the information and import it into the new environment.

The download exports the link types configuration information into a spreadsheet file with the parts grouped into tabs.

**To export project link types:**

1. From the **System** menu, select **Process > Link Types**.
2. Click **Download** in the top right corner of the page.

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

**To import project link types into Accolade:**

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any link types that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Link Types**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the link types in the spreadsheet, and adds any new link types with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

## Project Link Types Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each link type in the order listed below. For a description of each link type setting, see the Creating Project Link Types topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Link Types

Column Name	Accepted Values on Upload*	Additional Notes
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new link type is created.
<b>Link Type Display Name</b>	Any	If blank, the link type does not upload.
<b>Link From Name</b>	Any	If blank, the link type does not upload.
<b>Link To Name</b>	Any	If blank, the link type does not upload.
<b>Description</b>	Any	Can be blank.
<b>Line Color</b>	Any color.	If blank, defaults to <b>Black</b> .
<b>Arrow Direction</b>	Neither Direction To --> From From --> To Both Directions <-->	If blank, defaults to <b>Neither Direction</b> .
<b>Dependency Type</b>	Start - Start Finish - Finish Finish - Start Date - Date None	If blank, defaults to <b>None</b> . If <b>Date - Date</b> is selected, <b>Source Default Date</b> and <b>Target Default Date</b> need to be defined.
<b>Source Default Date</b>	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless <b>Dependency Type</b> is defined as <b>Date - Date</b> .
<b>Target Default Date</b>	Project Start Date Project End Date Gate 1...20 any available project date metric	Leave blank unless <b>Dependency Type</b> is defined as <b>Date - Date</b> .
<b>Manage Links</b>	To --> From From --> To Both Directions <-->	If blank, defaults to <b>Both Directions &lt;--&gt;</b> .
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Active</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

Column Name	Accepted Values on Upload	Additional Notes
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file.
<b>Restrict to These Roles</b>	Valid Accolade role	Separate roles using the pipe (   ) character.

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

- Mappings

Column Name	Accepted Values on Upload*	Additional Notes
<b>Link Type System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a link type exists, its settings are changed with the values in the uploaded file.
<b>From Process Model</b>	Valid process model system name	If blank, the link type does not upload.
<b>To Process Model</b>	Valid process model system name	If blank, the link type does not upload.
<b>Max Project Links</b>	Any number	Can be blank.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

## Importing and Exporting Global Links

Accolade provides Administrators and Process Designers the ability to export custom menu item configuration (global links) from one Accolade environment and import it into another Accolade environment. For example, your company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a

separate environment. Instead of having to recreate global links in each environment, download the information and import it into the new environment.

The download exports the global links configuration information into a spreadsheet file with the parts of the links grouped into tabs.

**Note:** The **Disable Link to File** and **Disable Link to Website** parameter settings determine if you can link to web site or file.

#### To export global links:

1. From the **System** menu, select **Process > Global Links**.
2. Click **Download** in the top right corner of the page.

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

#### To import global links into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any global links that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **Process > Global Links**.
4. Click **Upload** in the top right corner of the page.

Accolade uploads the changes to the global links in the spreadsheet, and adds any new global links with unique system names.

5. *(Optional)* Click **Print** to print the import results for your records.

## Global Links Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the settings for each global link in the order listed below. For a description of each global link setting, see the Adding Menu Items for Multiple Users (Global Links) topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Global Links

Column Name	Accepted Values on Upload*	Additional Notes
<b>Global Link System Name</b>	Alphanumeric characters, underscore**	Used for matching for upload. If a global link exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new global link is created.
<b>Global Link Name</b>	Any	If blank, the global link does not upload.
<b>Link Prefix</b>	Valid link prefix	Enter the prefix for the global link being created. Accolade supports the following link types: <ul style="list-style-type: none"> <li>• <b>http</b> - A URL to a Web page.</li> <li>• <b>https</b> - A URL to a secure Web page.</li> <li>• <b>ftp</b> - A link to an FTP download site.</li> <li>• <b>file</b> - A link to a file or executable on your company's intranet.</li> <li>• <b>qvp</b> - A link to a Dashboards for Accolade chart if using the Dashboards viewer.</li> <li>• <b>mailto</b> - Opens the user's email application and displays a blank email addressed to this email address.</li> <li>• <b>calto</b> - Opens your selected chat and collaboration tool, which invites the person at the address you define to a chat.</li> </ul> <p>💡 Based on your server setup, http, https, and file global link types are available to <a href="#">add as the content of a pod within a page layout</a>.</p>
<b>Link</b>	Valid link address	Enter the address for the global link being created. For example, www.google.com. If blank, the global link does not upload.
<b>Menu</b>	Alphanumeric characters	Used for matching for upload. If a display menu exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display menu is created. To create a global link that is only available to add to a pod within a layout, leave this option blank.

Column Name	Accepted Values on Upload*	Additional Notes
<b>Embed</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Landing Page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Default Home Page</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Order</b>	Any number	The field is set to <b>0</b> on upload if no value is entered or the value is not a number.
<b>Display in menu</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.
<b>Category</b>	Alphanumeric characters	Used for matching for upload. If a display category exists, its settings are changed with the values in the uploaded file. If a new, unique system name exists in the file when uploaded, a new display category is created. To create a global link that is only available to add to a pod within a layout, leave this option blank. Category is required on the global link to Display in menu.
<b>Delete</b>	Yes, Y, True, 1, X*	All other values are treated as <b>No</b> on upload.

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

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

- Roles

Column Name	Accepted Values on Upload	Additional Notes
<b>Global Link System Name</b>	Alphanumeric characters, underscore**.	Used for matching for upload. If a global link exists, its settings are changed with the values in the uploaded file.
<b>Roles</b>	Valid Accolade user role	Include a separate row for each role.

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

## Importing and Exporting Parameters

Accolade provides Administrators and Process Designers the ability to export parameter settings from one Accolade environment and import it into another Accolade environment. For example, your

company may have a test environment set up during your implementation, or you may have company branches that are new to Accolade that are hosted in a separate environment. Instead of having to reconfigure parameters in each environment, download the information and import it into the new environment.

#### To export parameters settings:

1. From the **System** menu, select **System > Settings**, then select the **Parameters** tab.
2. Click **Download** in the top right corner of the page.
3. In the Download dialog box, select the parameter settings that you want to download.



The dialog box automatically includes all parameters that can be set on this page, and additional selections can be added or removed as necessary.

To narrow the list by parameter name, add the criteria to filter by in the appropriate filter text box. These filters are case insensitive.

To narrow the list by category, select a category to display in the **Category** list.

Accolade downloads all selected parameters settings in alphabetical order in a spreadsheet file, and saves it to a temporary internet files directory. Save the file to a more accessible location.

#### To import parameters settings into Accolade:

1. Ensure the data within the spreadsheet meets the requirements for a successful import.
2. Remove any parameter settings that you do not want to include in the upload from the spreadsheet and save the file.
3. From the **System** menu, select **System > Settings**, then select the **Parameters** tab.
4. Click **Upload** in the top right corner of the page.
5. Click **Load File** and select the spreadsheet file to load.
6. Click **Upload File**.

Accolade uploads the changes to the parameters in the spreadsheet, and adds any new parameters settings.

7. *(Optional)* Click **Print** to print the import results for your records.

## Parameter Settings Included in the Spreadsheet File

The columns in the downloaded spreadsheet include the parameter display name and the value from the system. For a description of each parameter, see the Accolade Parameters topic in the online help.

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**Important!** Using the import and export tools to update configuration can result in unintended changes if information is missing or creates an error during the import process. Sopheon recommends reviewing Importing and Exporting Configuration Best Practices in the online help before making changes in a production environment.

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- Parameters

Column Name	Accepted Values on Upload	Additional Notes
<b>Parameter System Name</b>	Valid parameter system name	Used for matching for upload. If a parameter exists, its settings are changed with the values in the uploaded file.
<b>Display Name</b>	Parameter display name	This is included for identification purposes only and is treated as read-only on upload.
<b>Value</b>	Dependent on parameter being uploaded	If invalid, the parameter does not upload.
<b>Description</b>	Description of parameter	This is included for identification purposes only and is treated as read-only on upload.

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