Accolade

Administration Quick Reference

Navigating Accolade as an Administrator

Accolade | ⟳ Workspace System Resource Planning Dashboards VOL Global Links | + Add New | Q Search | ? | 🔔

Using Navigational Components

⟳ Recent Items: Display recently accessed items

? Help: Access help content for the current page

Search: Enter text to search for projects and files

Menu: Access main level pages

User Settings:
- **My Profile:** Access and make changes to your profile
- **Set As Home:** Make the current page your home page
- **About:** Display details of the current version of Accolade
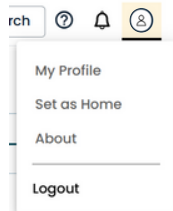
Accessing Administrative Actions

- **Access Groups:** Create and maintain access groups, security lists, and security profiles
- **Functions:** Labels to identify users who should own project components, including deliverables, workflow actions, and gatekeepers
- **User Admin:** Create, define, add, and import user accounts, and assign user attributes
- **Workflows:** Define the sequence of steps to create a deliverable or activity
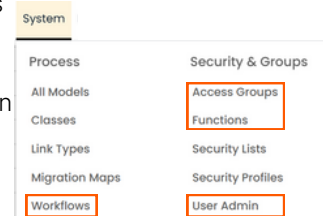
Defining Access and Setting Up Users

From the **User Admin** menu, you can access and edit user accounts and details, and search for users using various details including functions, email, and roles from the left panel.
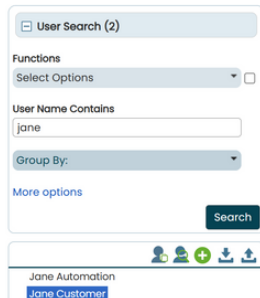
🧑 **Edit** attributes of users. To make the same changes to multiple user at once, select more than one user from the available list

➕ **Add** a new Accolade user to the database

⬇ **Download and upload** to add
⬆ new user accounts or make changes to existing user accounts

Assigning User Attributes

After creating a new user, ensure to assign relevant user attributes and settings:

- **General User Details:** Settings including whether the user account is active, when the user account expires, and the default display language and date format for the user.
- **User Roles and Rights:** User roles determine the portions of the application the user can see and what types of tasks the user can complete in Accolade.
- **Functions:** Functions help identify the type of specialist within your company that owns a deliverable, activity, workflow action, or gatekeeper position in a project.
- **Email Notifications and HTML Notifications:** Configure whether to receive notifications when a relevant Accolade events occur.

Adding Individual Users

1. Click to ➕ display the **Add New User** dialog.
2. Add user information individually or choose **Copy From** to duplicate a user's configuration details.
3. Click **Create**.

The new user displays in the center panel. Add details or edit as needed.

Importing Multiple Users

1. Create the spreadsheet file according to the specifications outlined in the Online Help.
2. Click ⬆ and select **Load File**, select the spreadsheet file to import.
3. Click **Upload File** to run the import.

Deactivating Accounts

This removes user access but saves the account
1. In the users list, select one or more users to deactivate.
2. In the **General Details** tab, clear the **Active** check box.
3. Click **Save** to save your changes.

Removing User Accounts

This removes users from default assignments, project teams, and deletes the account
1. In the users list, select one or more users to deactivate.
2. Click **Delete User(s)**.

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Securing Information

Access Groups: Containers that determine user access to project components, reference tables, and planning elements in Accolade Innovation Planner
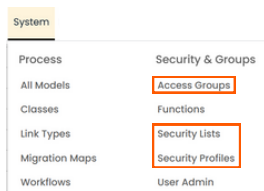
Security Lists: Hierarchical lists that control projects and unowned resource pools access

Security Profiles: Define project access based on classes and metrics associated with a project and user

Creating Functions and Functional Areas

1. Navigate to **System > Security & Groups > Functions**.
2. Click **Add Functional Area** to create a group that contains functions or select a functional area and click ⊕ to add a function within the area.
3. Enter the required information. Click **Apply**.

Creating Access Groups

1. Navigate to **System > Security & Groups > Access Groups**.
2. In the Access Group list, select the group and the level to which you want to add a child group and click ⊕
3. To create the first group in a new hierarchy, select the topmost group.
4. Enter a unique name and system name and click **Create**.

Granting Security Permissions

1. From the **User Admin** page, select the user(s) to modify.
2. Select the security setting to update: Access Groups, Security Lists, or Security Profiles.
3. Select the appropriate check boxes to assign users.
4. Click **Save**.

Building Security Lists Using Reference Tables

1. Create a spreadsheet titled SGM_SecurityList_ that includes a worksheet named SGM_RefTableSheet.
2. Add the following columns in order: ID, ParentID, Name, Level, LevelName, and enter list values.

3. Add the file as a reference table with a system name SGM_SecurityList_<number> where is 1 to 5. This example builds:

Configuring Accolade

Importing & Exporting Configuration Components

Administrators can transport configuration components between environments by exporting and importing via spreadsheets. Components that can be moved include:

- **Process Models:** System > Process > All Models
- **Access Groups:** System > Security & Groups > Access Groups
- **Functions:** System > Security & Groups > Functions
- **Charts & Reports:** System > Content Source > Charts & Reports Manager
- All System Configuration Components

To export settings, select desired component and click **Download To** import settings, ensure data meets requirements for a successful import, update the downloaded files to add or remove the changes, select the file, and click **Upload**.

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

Replacing Logos

1. Create or locate the company logo to use and save it in an accessible location, ensuring that the file name is logo.png and the size is **107 x 18 pixels**.
2. Copy and paste the new file over the existing graphics files in the following default installation path on the application server: C:\Program Files\Sopheon\Accolade\Website\Content\Themes/Accolade\Images

Adding Header and Footer Text

In the **Accolade Administration Console**, update the **Accolade Page Header Text** and/or **Accolade Page Footer Text** system parameters to have required text display for all users.

Other Ways to Configure Your Site

Search the Online Help for more information on these topics)

- Custom pages using page layouts
- Links to other sites and directories using Global Links
- Deliverable and activity display options
- Events for MS Office documents