CRM/BPM Demo KB Documentation

CONTENTS

INTRODUCTION

The CRM/BPM Demo KnowledgeBase (abbreviated KB) includes a large number of prebuilt business functions to make it easy to start managing several business processes with Agiloft without having to build them from scratch. When you set up a free hosted KnowledgeBase or download and install the Demo KB, you select the functions you want to enable. The functions that you check will be visible to the appropriate groups of users as described below. Those that you do not check will be deactivated so that their presence on the screen will not be distracting. They can be activated at any time from the Setup > Tables menu if you decide to use them.

Need an application to manage external-facing customer support operations, internal helpdesk support functions, or both? Check our SERVICE DESK OPERATION TABLES.

Looking for a product to help you with Project Management, purchase orders, hours and billing? Check the PROJECT MANAGEMENT TABLES.

Need a Sales CRM system to manage new leads, opportunities, quotes, and assess marketing campaign results? Look at the SALES CRM TABLES.

View the CONTRACT MANAGEMENT TABLES or DOCUMENT MANAGEMENT TABLES section to find out more about the pre-built contract and document management functionality in the Demo KB.

Staff and End User Terminology

A note about terminology: We use the term **End User** to mean users who access the system through the end user interface (EUI), a simplified interface that allows them to create records of any kind, view any records made available to them, edit records defined as their own, and view any FAQs made available to them. These users cannot edit records defined as belonging to other people and they use the unlimited end user license.

We use the expressions "End User" or "Customer" interchangeably in this document to refer to users outside your company (external customers) or to company employees (internal customers) whose main role in the system is to make requests on their own behalf or for someone else (typically their supervisor or supervisee).

We use the term **Staff** or **Staff User** to indicate the people who are working on other people's issues – they may be problem solvers, technical support staff, IT staff, contract or document approvers, developers, sales reps, managers, administrative services staff, or any other types of users who access the system through the staff interface.

"Technician" may also be used to refer to members of the IT organization or other teams that will be responsible for handling, creating, or responding to requests submitted by customers or other technicians.

Both end users and staff users may be employees of your company. Staff users require their own named license or may share a concurrent staff license.

Groups and Teams

A first step in defining your processes and customizing the system is to consider the different sets of users who will be using the application and what kinds of access they will need.

Users in Agiloft belong simultaneously to both **groups** and **teams**. A user can belong to multiple groups and to a primary team with additional teams. A user's access to the system – the tables and tabs he sees, the records he sees, the fields he sees, the records he can create and edit, and the menu actions he can perform - depends on his group memberships. Group permissions are additive so users in multiple groups will receive the union of the all the group permissions. While you can create as many groups as you need, it is preferable from a maintenance perspective to keep the number of groups small.

A user's primary team determines what look and feel scheme he sees – so you can have customers on different teams actually seeing a differently branded interface with different logos and colors. Staff Teams are generally used to define functional groups to whom tickets will be assigned and emails sent.

In brief, groups determine the content of what members see and what they can change. Customer/end-user teams determine look and feel while Staff teams identify functional units to whom records can be assigned and edited.

This section describes the different sets of users and the default assignment of users into groups and teams.

Groups

Groups are used to set distinct access permissions. Permissions can be set under Setup > Access > Manage Groups, but also are available at the table and field level on the Permissions tabs of the Table wizard and Field wizard. Permissions can be set for creating, viewing, and editing records, either the user's own or others, and permissions can be set for a group down to the field level.

Users may belong to more than one group and the access permissions are cumulative. This means that if a user belongs to a group with permission to view a field and to another group that does NOT have that access, they will still be able to see the field. Groups do not restrict permissions given by other groups.

This table lists the default role of each group and the permissions of its members.

Group	Type	General description of roles and access permissions
admin	Staff	These users have full access to the system. They can configure the system, create and modify tables and fields, edit the system including rules and workflow, and view, change and delete all records.
adminimport	Staff	These users have full access to the system. They can configure the system, create and modify tables and fields, edit the system including rules and workflow, and view, change and delete all records. They have special permissions used when importing records.
Anonymous	Staff	Group for an Anonymous user, to enable editing records from an email hyperlink sent to a user who is not registered in the system.
Approvers	Staff	These users can edit contracts and approvals for which they are the current approver.

Group	Type	General description of roles and access permissions
Contract Creator	End User	For internal employees who can create contracts.
Contract Manager	Staff	For internal employees who can create and edit their own contracts and view all contracts.
Contract Owner	Staff	These users can edit only those contracts assigned to them as Internal Contract Owner. They can view all contracts.
Customer	End user	Basic external end user who may submit support cases and view his own cases.
Customer Manager	End user	These users are able to view project information related to their own projects and they may view all support cases submitted by their company.
Document Creator	End User	External or internal user who can create a document as an end user.
Document Manager	Staff	Staff users who can approve and publish documents.
Guest	End user	This group is used in hyperlinks to allow creation of new leads, new users, and new cases without seeing the rest of the user interface.
Internal Customer	End user	For internal employees who will be end users of the system and able to submit helpdesk cases and other internal requests.
Marketing	Staff	For Marketing staff whose primary role is managing campaigns and leads.
Project Manager	Staff	Users responsible for performing billable professional services and managing projects.
Repair Customer	End user	Customers who are allowed to submit Repair Requests directly.
Sales	Staff	For sales staff, appropriate for sales reps.
Sales Manager	Staff	Sales Managers access to contracts, sales tables.
Selfregistered User	End user	User who self-registered via the "register" guest login.
Support Manager	Staff	For support teams managers, with record deletion and other privileges.
Support Staff	Staff	Will be able to view projects and also perform work on them, but cannot create them.

Teams

Navigate to Setup > Access > Manage Teams to view or edit teams and their properties.

Teams are the main assignment and notification units. Tickets can be assigned to entire teams or their individual members, and likewise notifications can be sent to entire teams or individual users.

Users can be members of multiple teams. Their team membership is defined in their user record and is contained in two fields. The Primary Team field holds a single team, used to determine which Look & Feel scheme they see, and their default view of each table. The Teams field is a multi-choice field that **should include their Primary team** and any additional teams to which they belong. The Teams field is used as the filter for the Assigned inbox, for email notifications, and so on.

To provide a custom look and feel and customer branding to different sets of users you will need a separate customer/end user team to go with each Look & Feel scheme. Teams can also be assigned a different default language, so it may make sense to have language-based customer teams if you plan to run the program in a multi-lingual environment.

Each team can have assigned working hours (in addition to languages). The hours are expressed as hours relative to the main KB time. These hours can be used in escalation rules and reports to exclude non-working hours for the assigned team. The teams preconfigured in the Demo KnowledgeBase are detailed below:

Teams	Description
Admin Team	Team that is responsible for Agiloft system set-up, maintenance, and support; they receive notifications about rule, email and other errors.
Agiloft Implementation Team	Agiloft employees responsible for implementing Agiloft; this team is used when Agiloft is providing implementation services.
Change Approval Team	Default team to approve change requests.
Company Team	The Company Team is generally the parent team for all internal operational teams and may define the standard company working hours for all teams.
Compliance Team	Team for contract approvers working on contract compliance.
Contract Creator Team	Contract end users who can create contract and manage their own contracts.
Contract Manager Team	Managers of contract creators.
Contract Owner Team	Team for staff contract owners or buyers.
Customer Manager Team	Customer managers.
Customer team	For external customers, though more specific customer teams may be created with specific branding.
Document Approval Team	Team that approves documents.
Document Creator Team	For internal end users.
Finance Team	Finance Team for contract approval and review.

Teams	Description
Internal customer team	For end users inside your company, they are employees who may submit helpdesk cases and other customer functions within your organization.
Internal Implementation Team	Team responsible for implementing, testing, and rollout of Agiloft; this team is used when Agiloft is providing implementation services; they are Admin group users that coordinate with Agiloft Implementation team members.
Marketing team	For members of the Marketing team.
Project Manager Team	Members of this team are assigned to projects.
Repair Team	Default team assigned to new repairs.
Risk Team	Risk Team for contract approval and review.
Sales Manager Team	Sales Managers.
Sales Team	For members of the Sales department.
Support Manager Team	Support Managers.
Support Team	For members of the Support department.
System Admin Team	System Administration team.
Vendor Team	Team for end users who are specifically Vendors in the system.

Table Structure and Terminology

Tables are the primary organizational components of a KB and consist of a number of different entities linked and working together.

Records store and group data items, called fields, into one table entry.

Record **Ownership** is used to control access to records. Users accessing the system under the End User license may only edit records they own. Ownership is set for each table by matching the value of a field in the current table to a value in the user's People record.

Fields are data items which contain specific information, and are the components of a table record. A data entry form is used to collect field values, which are then used to create a record in a table. Field values may also be imported into a record.

For example, two tables in the Demo KB are the Company table and the People table. Companies and People are two distinct entities, each with different types of information associated with them. These data items are defined as fields. Company Name and Company State may be two fields in the Companies table storing the company name and state. Employee Name and Job Title may be two fields in the People table. Each company will have its own record in the Company table and likewise, each person will have their own entry in the People table.

Saved Searches are created on a per-table basis, and help you find specific types of records, or limit the listed records to a certain subset.

Views are also defined by table and allow you to create custom layouts when viewing lists of records to show particular field information. Both Saved Searches and Views can be made available to other users if you so choose.

Each table may also have a collection of saved **Email Templates** and **Print Templates**.

Rules are specific configurations of actions and searches that perform business logic operations. They can be set to run on specific timelines or criteria, and can perform simple or complex actions on your records.

Each table may also have a **Workflow**, which defines state transitions for a process and specifies which transitions are possible from any other state. This determines the visible choices in a special "Workflow State" field. These transitions may run stored actions, such as sending an email from a saved Email Template, or trigger a rule that automatically updates a field.

ADMIN SETUP MENU ITEMS

Licenses

The Setup > License menu allows administrators to manage licenses, request new licenses, and view usage of current licenses.

Access

The Setup > Access menu allows administrators to manage groups, teams, LDAP settings, Single Sign-On, and hotlinks. Refer to the lists of Groups and Teams above to view the default setup.

Import/Export

The Setup > Import and Setup > Export wizards are intended to help administrators import and export copies or parts of KnowledgeBases. This involves defining the KB file's location, name, and format, along with settings for what data is to be exported/imported.

Sync

The Setup > Sync interface allows administrators to configure external system synchronization, and can also be used to transfer the structure of one KB to another.

System

The Setup > System menu allows administrators to set global variables and KB Time, the time standard used by all fields. Administrators can also configure the Activity Log, manage choice lists, edit page headers for the KnowledgeBase, view log files, and configure SOAP/REST web services.

Localization

The Setup > Localization wizard assists administrators with translating text in the KnowledgeBase to other languages. The wizard gives a breakdown of the system by table with red markings on tables that need translation. The administrator may download the text file containing all the relevant field names, input instructions, etc. After translating the file into the target language, use the wizard to upload the translation file.

End User Interface

Users accessing the system through an unlimited End User license are taken to a customizable End User Interface (EUI), a simplified interface with fewer options than the Staff Interface. The default EUI is HTML-based and can be modified through the out-of-the-box HTML templates provided in the EUI Templates table (see EUI TEMPLATES TABLE later in this document).

Note that you have a choice of end user interfaces. In addition to the customizable EUI, we offer a second simple end user interface, the Legacy EUI, which may be appropriate for customers who do not need the flexibility provided by access to the HTML. Both the EUI and the Legacy EUI can be configured to show different tabs, tables, and requests depending on the user's group membership and group permissions.

1. Access the EUI by logging in as an end user and selecting the End User interface radio button.

2. Access the Legacy EUI from a Demo KB login page by logging in as an end user and selecting the Staff interface radio button.

Figure 1. The default login screen.

As an admin user, Setup > End User Interface is where you can define the FAQ interface for both the custom EUI and Legacy EUI. By default, FAQs are available for both the Support Cases and Helpdesk Cases tables, filtered to records in which the Published field is set to Yes.

Default EUI Setup

In our out-of-the-box setup, the EUI is configured primarily for users in the Guest, Internal Customer, Document Creator, Contract Creator, and Repair Customer groups. The table below outlines the available functions and navigational tabs each user group sees when accessing the EUI.

Groups	Default EUI Tabs
Guest	FAQs (Support Cases) Submit a Case (new Support Case) New User
Internal Customer	FAQs (Helpdesk Cases) Submit a Case (new Helpdesk Case) My Cases (Helpdesk) My Profile
Document Creator	FAQs (Documents) Submit a Document My Documents My Profile
Contract Creator	Submit a Contract (new Contract) All Contracts My Contracts My Profile
Repair Customer	FAQs (Support Case) Submit a Repair Request My Repair Requests My Profile

For more detailed information about working with the HTML-based end user interface, please review the End User Interface Tutorial at our website.

Legacy EUI Setup

Define the default search and view to be executed for users when they click the My Items tab by clicking Customize under Setup My Items. The other tabs in the Legacy EUI are dynamically generated based on group permissions of the user logged in, and their visibility is determined by those permissions.

The My Items tab displays records in all the tables that a user has permission to view. The records displayed when clicking on the My Items/My Support Cases or other subtab are defined in Setup > End User Interface > My Items.

Users will see a New [*Table Name*] tab for any table for which they have been given "create own" permissions. By default, Customers group members see the New Support Case tab, while Internal Customers group members see the New Helpdesk Case tab.

The My Profile tab is visible if a user has view and edit permission to his own user record.

Custom Look & Feel Schemes

Agiloft allows you to apply different colors, fonts and image schemes to different teams. The user's Primary Team sets their Look & Feel scheme. The Demo KnowledgeBase applies the same Look and Feel to all teams, but this is configurable under Setup > Look & Feel.

DEMO KNOWLEDGEBASE TABLES

This documentation describes the use of and configuration of all of the tables included in the CRM/BPM Demo KnowledgeBase.

Most tables are grouped by the primary function that they support, so that you can focus on the portions of the Demo KnowledgeBase that are most applicable to your use of Agiloft. Tables are grouped by the following business functions:

- Support Operations
    - Contract Management
- Project Management
- Sales CRM
- Document Management
- Surveys

The People, Company, Department, Location, and Task tables are used across functions, and they are documented on their own.

All other Agiloft tables are documented individually. If no subsection on reports is included, the table has no default Charts and Reports.

BACKGROUND TABLES

Background tables are ones that contain mostly static data. They function as repositories of records and contain little to no associated business processes. The information stored in background tables is used to directly support other tables. Unlike the System tables which users will rarely interact with, background tables may still be manipulated on a not infrequent basis by staff users.

The background tables are detailed below.

People Table, and Employee/External User Sub-Tables

The People table and its two sub-tables (Employees / External Users) are used to store information about individuals, including any associated Company or contact information. People may be external or internal to your company.

In this document, the terms "contact" and "people"/"person" are used interchangeably.

Use Case

People records may be created by members of the Admin, Support Staff, Professional Services, Sales Staff and Guest groups. People may also be created as the result of a conversion from a Lead record, or may be created during an import from an external database such as an LDAP directory.

Record creation by Guest users is enabled by default so users can create their own logins using the limited-access "register" account. Records created by the Guest login "register" are added to the default Customer group.

There are two subtypes of People records: Employees and External Users. Individuals may be stored in the system as an Employee, an External User, or a Person that is unassociated with either sub-table.

The External Users sub-table stores external people who may or may not be users of the system. Each record includes fields to associate these users with companies, contracts, events, and other activities that relate to external users.

The Employees sub-table holds information about company employees. It stores information like home address and working hours that the External Users Table does not. If LDAP or Active Directory authentication is used, this typically creates and updates users in the Employees sub-table.

By default, People records also include embedded tables showing all of a user's Support Cases as well as any related records from other tables.

As a background table, many other tables link to the information stored in the People table.

Ownership

Records in this table are owned by an individual.

People records not associated with either sub-table are owned by the user whose Full Name matches that of the name in the Contact Owner field. The Contact Owner defaults to the user who created the People record.

Employee and External User records are owned by the user whose login matches the Login field of the record. More simply, each Employee or External User owns his own record.

Reports

The People table contains the following default Charts/Reports:

Companies Table

The Companies table is used to store information for companies stored in the system. The information stored typically includes the company name, company address, and any contact information for the Company.

Figure 2. Sample Company record.

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Use Case

New Company records may be created by members of the Admin, Professional Services, Support Staff and Sales groups. For those using Agiloft to manage sales leads, companies can also be created by conversion from the Leads table once they become customers.

As a background table, many other tables link to the information stored in the Companies table.

Ownership

Records in this table are owned by the Account Rep; thus each record is associated with a particular user. By default, the Account Rep is the user who created the Company record.

Reports

The Companies table contains the following default Charts/Reports:

Departments Table

The Departments table stores information about any departments internal or external to the company. Each record typically stores the department name and a main contact, if applicable.

Use Case

Department records may be created by members of the Admin groups.

As a background table, many other tables link to Departments, including the Employees subtable.

Ownership

Department records are owned by the user whose Login matches the Creator Login field in each Departments record. More simply, a Department record is owned by the user who created it.

Locations Table

The Locations table is used to store information on multiple locations of a parent Company.

Figure 3. Sample Location record.

Use Case

Location records may be created by members of the Admin, Contract Manager, Document Manager, or Support Manager group.

Each Location can be linked to a parent company from the Companies table. Each Location holds a single address and can serve as multiple Location Types.

Ownership

Locations records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

SERVICE DESK OPERATION TABLES

This section documents the out-of-the-box setup of tables related to running a support organization. It is broken down into three sections:

- SERVICE DESK AND CHANGE MANAGEMENT TABLES

- ASSET MANAGEMENT TABLES

- REPAIR REQUESTS TABLES

SERVICE DESK AND CHANGE MANAGEMENT TABLES

Support Cases Table

The Support Case Table is used to hold and manage external customer support requests.

Figure 4. Sample Support Case record.

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Use Case

End User Record Submission

Customers may create support cases using the tab in the end user interface or by sending an email (once an inbound email address is set up).

When a customer submits a support case, the contact information fields automatically populate based on the details in his/her user record. If the user record does not contain a value in the Customer Name or Customer Email fields, the customer will be required to enter a value in those fields manually.

The Type of Issue is set by default to Question. If the customer changes it to Installation Issue or Bug, they will be required to fill out the Steps to Reproduce field. The case is assigned by default to the Support Team and the default status is Open.

Technician Record Submission

Staff members may also submit support cases on behalf of a customer, associating the customer with the case. If an internal staff user creates a case, he may assign it directly to an individual or a team other than the Support Team and may set its initial Status to Open, Assigned, or Closed.

When the record is created, emails are sent to the customer acknowledging receipt of the support case and to the Assigned Team (or Assigned Person) telling them the case has been assigned to them.

If a Support Staff technician creates a record in a Status of Closed an email is sent to the customer telling them how to reopen their case.

Workflow actions send these emails automatically, but staff users can override them if given permission to override workflow actions.

Processing of Records

When a technician works on a case, if he needs more information from the customer in order to take further action, he can set the Status to Sent to Customer. This will automatically send an email to the customer requesting further information and include the content of the Additional Notes field, an append-only field that is used to communicate with the customer. The email includes a hyperlink for the customer to click to login to edit the case directly.

When the customer edits the case or replies to the email, the Status changes to Updated by Customer and an email notifies the assigned person that the customer has replied. The customer is able to update the Additional Notes field directly and any text from an email reply to a system email maps to that same field.

If the customer updates the case at any point, an email notifies the assigned person of the update.

If the technician needs to reassign the case to someone else, he or she simply changes the Assigned Person field to that person's name and the system will email the new assignee notifying them of the reassignment.

The Staff Only Notes field holds working notes that should not be visible to the customer.

If a staff person wishes to update the customer on progress, he can simply type notes into the Additional Notes field. A rule will automatically send anything typed into the Additional Notes file as a message to the customer.

Time keeping is enabled so that when editing a case, a staff person can put time spent into a Time Spent field and a description into the Time Description field and click the Add Time button, and this will automatically create a Time Entry record associated with the case. All time related records are shown on the Time tab in the support case, along with a running total of time spent. Time reports may be run on the Time Entry table. If there is an associated task with time entries recorded against the task, those time entries will be included and reported in the running total of time spent.

When the technician has completed work on the case, he/she sets the Status field to Closed and puts the solution notes into the Solution field. This triggers an email to the customer that includes the content of the Solution field and tells the customer that the work is done. This closing email gives the customer a hotlink back to the record if they wish to reopen it and instructs them to explain why they are not satisfied with the solution. Clicking the hotlink will automatically change the I Would Like to Reopen My Ticket field to Yes, which in turn sets the Status of the ticket to Reopened and notifies the Assigned Person.

By default, no escalation rules are set up for the Support Case table.

Ownership

Records in this table are owned by the individual customer. Specifically, a record is owned by the use whose Login matches the Customer Login field.

Automation

Create: New support case actions

Purpose: This handles all notification actions when creating a Support Case.

Runs: When created by web, email or API.

Search filter: None.

Priority: 1

Actions:

I: Email Assigned team or person of new case

```
if (Assigned Person!=NULL) {
      Email assignee about new case
} else if (Assigned Team!=NULL) {
      Email Assigned team new case
```

Edit: All customer update actions

Purpose: This handles all notifications and Status updates actions when editing a Support Case as an end user or customer.

Runs: When edited by web or email.

Search filter: R: Updater Team is customer or updater is customer login

Priority: 2

Actions:

I: Customer Update Ticket Actions

```
if (I Would Like To Reopen My Ticket changed from: any value to: 'Yes' last user's modification and Status='Closed') {
    Change Status To Reopened
}
if (Status='Sent to Customer') {
    Set State to Updated by Customer
}
if (Assigned Person!=NULL) {
    Email assignee about an update
} else {
    Email Assigned Team of Customer Update
```

U: Change Status to Reopened

Updated Fields: Status

Updated Value: Reopened

U: Set State to Updated by Customer

Updated Field: Status

Updated Value: Updated by Customer

Edit: All edit actions done by staff users

Purpose: This handles all notifications when editing a Support Case as a staff user.

Runs: When edited by web or email.

Search filter: R: Updater not customer and not customer team member

Priority: 1

Actions:

I: All edit actions by staff no api

```
if (Assigned Person changed from: any value to: any value last user's modification and Assigned Person!='$_1903_full_name') {
        Email assignee when case is reassigned to him
}
if (Additional Notes changed from: any value to: any value last user's modification and Status not changed last user's modification)
{
        Email customer updated additional notes
}
```

Workflow

The Support Case table has the following default workflow:
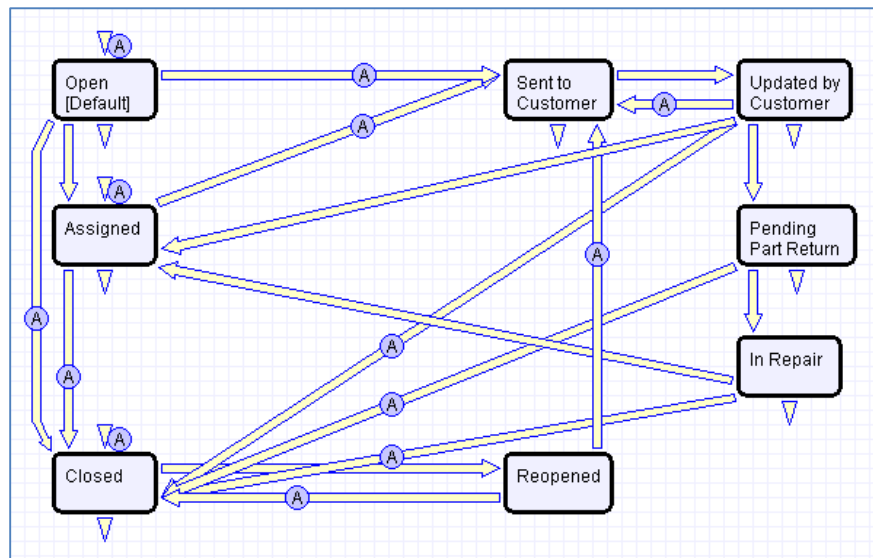
Workflow Automation

E: Customer Acknowledgement Email

Notes: This email is sent to customers on the creation of a ticket in a Status of Open or Assigned.

E: Email customer when closed on creation

Notes: This email is sent to customers when the ticket is created in a state of Closed.

E: Email customer that input is needed

Notes: This email is sent when the status changes from any Status to Sent to Customer.

E: Closing email to customer

Notes: This email is sent when the status changes from any Status to Closed.

Reports

The Support Case table contains the following default Charts/Reports:

Charts/Reports

Status: 20 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete

Views

Edit View	Title ↑	Published	Filter
	All Cases by Priority Funnel	Yes	
	All cases by Workflow State / Priority	Yes	
	All cases segmented by Type of Issue / Priority	Yes	
	All Cases. Pie chart by Type of Issue	Yes	
	Average elapsed time to close by Closed By person	No	All Closed Cases
	Average elapsed time to close for each month of past year	Yes	C: Date Closed in Past Year
	Average time spent by staff to resolve Cases by Type of Issue	Yes	
	Cases closed each month of past year by Type of Issue	Yes	C: Date Closed in Past Year
	Gauges of open Cases by Priority	Yes	Not Closed
	My Assigned open Cases by Priority, funnel chart	Yes	My Assigned
	Number of Cases closed by Person by Priority	No	All Closed Cases
	Number of Cases closed each month of past year by Closed By	No	C: Date Closed in Past Year
	Number of Cases created each month of past year	Yes	C: Date Created in past year
	Number of Cases created in past 3 months segmented by Week / Priority	Yes	
	Number of Cases created in past month by day/ Priority	Yes	Created in past month
	Open Cases by Assigned Person / Priority	No	Not Closed
	Reopened Cases for past year by Assigned To	No	C: Status changed to reopened in last 12 months
	Summary of Support Case activity	Yes	
	Trend of Cases. Segmented by Type of Issue	Yes	
	Trend of Support Cases submitted per month for past 6 months. Segmented by Type of Issue	Yes	

Helpdesk Cases Table

The Helpdesk Case table is used to hold and manage internal support requests. Unlike the Support Case table, the Helpdesk Case table does not contain many fields that are related to the user company.

Figure 5. Sample Helpdesk Case record.

Use Case

Helpdesk cases may be created directly by internal customers using the web form or by internal staff on behalf of a customer such as during a phone call. If an inbound email address is set up, new cases may also be created via email.

The Helpdesk Case table is intended for use by internal, registered users. No information regarding Customer Company, SLA, or contract status is applied. When a customer submits a Helpdesk Case the User Information fields automatically populate with details from their user record. If no values are found for the Customer Name or Customer Email fields matching the user's record, the creator will be required to enter a value in those fields manually.

Only the Type of Problem field is required to submit a Helpdesk ticket. Selecting different options from the drop down for Type of Problem will give different dependent choices in the next field, Subtype of Problem.

If a selection of "Software" and a Subtype of Problem of anything other than "Other" is chosen, a filtered list of available applications becomes visible.

Selecting "Service Request" for Type of Problem and "New Employee Setup" for Subtype of Problem causes the New Tasks field to appear. This field is a link to the Task Title in the Task Templates table, displayed as checkboxes and filtered to the appropriate templates for New Employee Setup.

After selecting the New Tasks, when the record is saved, a set of tasks based on the selection are automatically created and linked to the Helpdesk Case record.

Helpdesk cases may be related to a specific asset in the Asset table – there is a field called Related to an Asset, which has a default value of No. If it is changed to Yes, then a set of linked fields from the Asset table will allow the user to select from assets that are owned by the submitter of the helpdesk case or are shared assets. These fields are only on the staff layout by default, though they may be added to the end user layout to make them available for end users (appropriate permissions would need to be given to the Asset table for end users as well).

Cases are assigned by default to the Support Team with a default Status of Open. If an internal staff user creates a case they may assign it directly to an individual or a team other than the Support Team. The initial Status may be set to Open, In Progress, or Closed.

Two emails are sent at record creation: one to the customer acknowledging receipt of the helpdesk case, and one to the assigned team (or person) notifying them of the assignment.

When a record is created with an initial Status of Closed (e.g. by a technician to document a phone call that resulted in an immediate resolution), an email is sent to the customer telling them and letting them know how to reopen their case if needed.

Most automatic emails are sent due to actions based on the Helpdesk Cases workflow. This workflow can be changed so that staff users may override or suppress these automatic emails.

Processing Records

Helpdesk Cases contain a number of fields for use during the handling of a ticket. The Additional Notes field is an append-only text field used to add more information to a ticket after the initial submission. This is particularly useful for communications between a staff person and the customer and is accessible to both the submitter and the assignee.

If the technician working on a case needs more information, they can set the Status to Sent to Customer. The workflow will automatically send an email to the original ticket submitter to notify them that more information is required and give them the latest addition to the Additional Notes field. This automatic email contains a link so the submitter can log in and edit their ticket directly.

The submitter can add information by directly updating the Additional Notes field in the web form, or by replying to an email from Agiloft. Email updates are mapped to the Additional Notes field. Once the submitter edits their case or replies via email, the case status changes to Updated by Customer, and a notification email is sent to the assignee.

If the submitter updates the record at any point, an email notifies the Assigned Person of the update.

If the technician wishes to send the customer an update without changing the Status, he can simply type notes into the Additional Information field. This will trigger an email to the customer telling them their case has been updated and including these new notes.

If the technician needs to reassign the case to someone else, he changes the Assigned Person field to the new assignee's name. The system then emails the new assignee notifying them of the assignment.

The Staff Only Notes field holds working notes that should not be visible to the customer. Note that this field will still be visible if the original submitter is part of the Support group, but is hidden for all other end users.

Time keeping is enabled so that when editing a case, a staff person can put time spent into a Time Spent field and a description into the Time Description field, and can then click the Add Time button to automatically create a Time Entry record associated with the case. All time related records are shown on the Time tab in the helpdesk case, along with a running total of time spent. Time reporting may be done on the Time Entry table. If there is an associated task with time entries recorded against the task, those time entries will be included and reported in the running total of time spent.

If tasks were manually created or created through conversion, a pair of counters records the number of associated tasks and the number of associated tasks that have been completed. When the number of completed tasks equals the number of associated tasks, an email will be sent to the Assigned Person or the Assigned Team to notify them that the Helpdesk can be possibly be closed.

If the technician attempts to close the Helpdesk Case with tasks that have not been completed, a validation rule will alert the technician that the Helpdesk Case cannot be closed with tasks still open.

When the assignee has completed work on the case, they set the Status to Closed and write the solution notes into the Solution field. This triggers an email to the submitter that includes the content of the Solution field and tells the customer the work is completed. This closing email gives the customer a hotlink back to the record, in case they wish to reopen it. The email also instructs them to explain why they are not satisfied with the solution in the event of a reopening. Clicking the hotlink will automatically change the I Would Like To Reopen My Ticket field to Yes, which in turn sets the Status of the ticket to Reopened and notifies the assignee. The Helpdesk Case table also has a rule set up to track the number of times a case has been reopened. This is useful for tracking customer/submitter satisfaction levels.

No escalation rules are set up by default.

Ownership

Records in this table are owned by the submitter. Specifically, a record is owned by the user whose Login matches the Submitter Login field.

Automation

Create: All creation actions

Purpose: This handles all notification actions when creating a Helpdesk Case.

Runs: When created by web, email or API.

Search filter: None

Priority: 2

Actions:

I: All create actions

```
// Email the assigned person or team of new case
if (Assigned Person!=NULL) {
      Email new case to assigned person
} else if (Assigned Team!=NULL) {
      Email Assigned Team of new Case
}
```

I: Trigger Creation of Tasks from Template

```
if (New Tasks!=NULL) {
      Update Last HC ID Fields
```

Notes: When a new task is selected in a Helpdesk Case, this action will update a field in the linked Task Template(s), which will initiate a conversion of the Task Template to a Task.

Edit: All actions when updated by staff members

Purpose: This handles all notification and reopen actions when editing a Helpdesk Case by a staff member.

Runs: When edited by web or email.

Search filter: R: Updater not customer

Priority: 2

Actions:

I: Edit actions by staff

```
if (Status changed from: any value to: 'Closed' last user's modification and I would like to reopen my case="Yes") {
      Reset reopen flag
}
if (Assigned Person changed from: any value to: any value last user's modification and Assigned Person!='$updated_by') {
      Email assignee about reassignment
} else if (Assigned Team changed from: any value to: any value last user's modification and Assigned Person=NULL) {
      Email new assigned team about reassignment
}
if (Additional Notes To/From Customer changed from: any value to: any value last user's modification and Status not changed last user's modification) {
      Email customer that case has been updated
}
```

I: Trigger New Task Creation

```
if (New Tasks changed from: any value to: any value last user's modification) {
      Update Last HC ID Fields
```

Edit: Task Updates made by API

Purpose: This handles all notification actions when related tasks are completed.

Runs: When edited by API.

Search filter: R: Updater not customer

Priority: 12

Actions:

I: Task Completion Actions

```
if (Number of Completed Tasks='$number_of_tasks') {
      if (Assigned Person=NULL) {
            Email Assigned Team All Tasks Completed
      } else {
            Email Assignee All Tasks Completed
```

Edit: Actions when end user updates

Purpose: This handles all notification actions and status updates when updated by a customer.

Runs: When edited by email or web.

Search filter: Updated by customer

Priority: 1

Actions:

I: End User Update Actions

```
if (Status='Closed' and I would like to reopen my case='Yes') {
      Change Closed to Reopened
      Update # of time reopened field
} else if (Status='Sent to Customer') {
      Change to Updated by Customer
}
// If assigned to a person, notify them, otherwise notify team of update
if (Assigned Person!=NULL) {
      Email assignee customer update
} else {
      Email assigned team customer update
```

Edit: All Validation Rules

Purpose: This handles all notification actions when related tasks are completed.

Runs: When edited by web.

Search filter: None

Priority: 5

Actions:

I: All Validation Actions

```
if (Status changed from: any value to: 'Closed' last user's modification and Number of Tasks>=1 and Number of Completed
Tasks!='$number_of_tasks') {
      Cannot Close Case with Open Tasks
```

Notes: This validation action will prevent users from closing a Helpdesk ticket when there are uncompleted tasks.

Workflow

The Helpdesk Case table has the following default workflow:
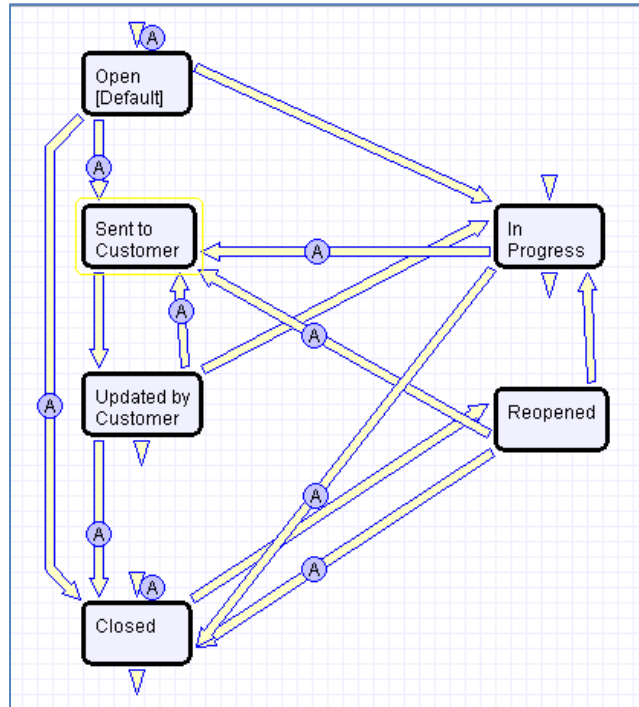
Workflow Automation

E: Email Customer Acknowledgement

Notes: This email is sent to customers on the creation of a ticket in a status of Open

E: Email customer created as closed

Notes: This email is sent to customers when the ticket is created in a state of Closed.

E: Email Customer Need Information

Notes: This email is sent when the status changes from any status to Sent to Customer.

E: Send closing email to customer

Notes: This email is sent when the status changes from any status to Closed.

Reports

The Helpdesk Case table contains the following default Charts/Reports:

Charts/Reports

Status: 19 record(s) found, 1 pages. Click here to re-count records.

New 🔁 | Copy 📋 | Delete 🗑   Views 👓 ▾ | 💬 | 📧

	Edit	View	Title ↑	Published	Filter
☐	📝	🔍	All Helpdesk Cases by Department / Type of Problem	Yes	
☐	📝	🔍	All Helpdesk Cases by Subtype of Problem	Yes	
☐	📝	🔍	All Helpdesk Cases by Type of Problem / Subtype	Yes	
☐	📝	🔍	All open Cases by Assigned To / Priority	Yes	Status is Not Closed
☐	📝	🔍	Average time to close cases in last 3 months, by Type of Problem	Yes	C: Closed in past 3 months
☐	📝	🔍	Average time to close Cases in last year by Type of Problem	Yes	C: Closed in past year
☐	📝	🔍	Funnel of open Cases by Priority	No	Status is Not Closed
☐	📝	🔍	Funnel of open Cases by Status	No	Status is Not Closed
☐	📝	🔍	Gauges of open Cases by Priority	No	Status is Not Closed
☐	📝	🔍	Helpdesk Cases created per week for past 3 months	Yes	
☐	📝	🔍	Number of Cases closed in past 3 month by Closed By	No	C: Closed in past 3 months
☐	📝	🔍	Number of Cases closed in past year by Closed by person	No	C: Closed in past year
☐	📝	🔍	Number of Cases closed per day in past month	No	C: Date closed in past month
☐	📝	🔍	Number of Cases created per day in past month	No	C: Date created in past month
☐	📝	🔍	Open Cases over 1 month old by Assigned to	No	C: Open and more than 1 month old
☐	📝	🔍	Pie chart of Cases by Submitter Department	Yes	
☐	📝	🔍	Total time spent by Submitter Department	No	
☐	📝	🔍	Total time spent by Type of Problem	No	
☐	📝	🔍	Trend chart of cases submitted over past 3 months by type of problem	Yes	

Change Requests Table

The Change Request table is used to hold and manage Change Requests. A request is created when a change is needed to an asset or to any other business object that may require an approval before such a change can be completed.

Use case

Once a change request is created, it can be assigned to the appropriate teams or individuals for approval, and may then be moved along in the process, from approval to in progress and eventually closed.

Figure 6. Sample Change Request record.

Technician Record Submission

Members of the Admin, Support Staff, and Professional Services groups may create new Change Request records. When creating a new Change Request, a staff member will open the new change request form and provide data for any required fields. Records can be created with a Status of Open or Pending Approval.

When a technician submits a Change Request, the Requester Information fields automatically populate based on the details in his/her user record. In the default setup, a request cannot be submitted on behalf of a user who has no user record in the system. However, the creator can select a different person as the Requester if needed.

The user is required to select a service after selecting a service category. When the service is selected, the user will see a description of the service, and any special instructions for that service. The service will also define the default number of approvals needed. Users in the appropriate groups may be given permission to change the number of approvals needed for a particular change.

When a technician creates the Change Request, he may choose an assigned team and assigned person filtered from the assigned team from the drop-down fields in the record header.

New Change Requests are created in the Status of Draft by default. During creation, a technician may change the Status to Pending Approval to reflect that the Change Request is ready to begin the approval process and a notification will be sent to the Approval team/person.

End User Record Submission

By default, Change Requests are not visible to end-users and cannot be created by them. This is defined by group permissions, and if you would like to allow end users to submit change requests, you can simply change the group permissions of the relevant groups to enable this.

Approvals

By default, Change Requests are assigned to the Change Approval Team for the approval process. If the request was approved, the status is automatically set to Approved and the Requester and Assignee are notified that the request has been approved. Consequently, if the request is rejected, the Status is automatically set to Rejected and the Requester is notified.

A validation action prevents someone who is not an approver or a member of the approval team from approving a Change Request.

Ownership

Records in this table are owned by the Requester. Specifically, a record is owned by the user whose Full Name matches the Requester field.

Automation

Create: All creation actions

Purpose: This handles all notification, linked record and time conversion actions when creating a Change Request.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

I: Conditional Creation Actions

```
if (Spawning SC ID!=NULL) {
      Update Spawning SC
} else if (Spawning HD Case ID!=NULL) {
      Update HD Case with note
}
if (Time Spent!=NULL) {
      Convert to Time Entry
      Set Time entry fields to blank
}
if (Status='Pending Approval') {
      Email Approval team or person
```

Edit – All staff edit actions by user no api

Purpose: This handles all approval validations, approvals, email notifications and time conversion actions when editing a Change Request.

Runs: When edited by web or email.

Search filter: None

Priority: 2

Actions:

I: Validations

```
if (Approved changed from: any value to: any value during record's last modification and Approval Team or Person!=' System'
and Approval Team or Person!<<'Admin Team') {
      Not an approver
```

Notes: This rule will prevent users from approving a Change Request if they are not identified as the approver or a member of the approval team.

I: Staff edit actions no api

```
if (Time Spent!=NULL) {
      Convert to Time Entry
      Set Time entry fields to blank
}
if (Approved changed from: any value to: 'Yes' last user's modification and Status!='Approved') {
      Set Status to Approved
      Email Requestor of Approval received
      Email Assignee of Approved Request
} else if (Approved changed from: any value to: 'No' last user's modification and Status!='Rejected') {
      Set Status to Rejected
      Email Requestor of Rejected Request
}
if (Status changed from: any value to: 'Pending Approval' last user's modification) {
      Email Approval team or person
}
if (Status changed from: 'Pending Approval' to: 'Approved' last user's modification) {
      Email Assignee of Approved Request
      Email Requestor of Approval received
}
if (Status changed from: 'Pending Approval' to: 'Rejected' last user's modification) {
      Email Requestor of Rejected Request
```

Workflow

The Change Requests table has the following default workflow:
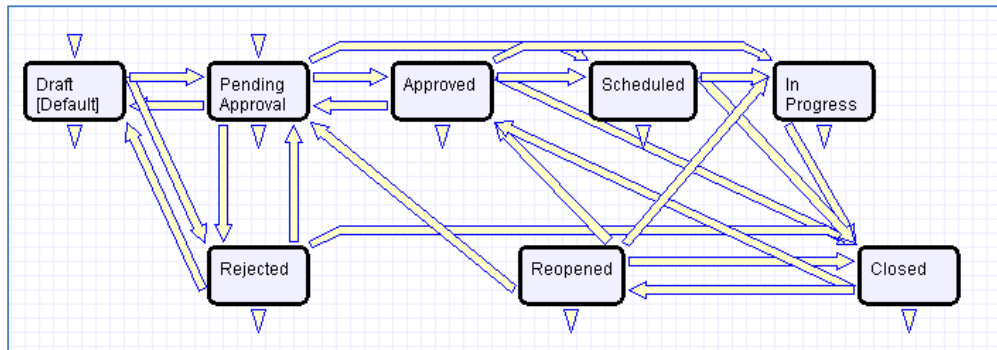
Reports

The Change Requests table contains the following default Charts/Reports:

Charts/Reports
Status: 5 record(s) found, 1 pages. Click here to re-count records.

Edit View	Title ↑	Published	Filter
	All open Changes by Status. Funnel chart and HTML	No	C: Status not rejected or closed
	Approved Changes by Requested Date of Completion	No	C: Approved in completion date order
	Changes completed last calendar year by Change Category	No	C: Date Closed in previous calendar year
	Number of open Change Requests by Assigned Team / Urgency	No	
	Pie chart of Change Requests by Urgency	No	

ASSET MANAGEMENT TABLES

Assets Table

The Asset table holds records containing information about your company's assets. This may include computers, software, smartphones, or other assets. It may also be used to hold information about equipment, hardware, or parts that customers have purchased.

By default, it is designed to hold assembled assets. Tracking individual components may require creating additional tables to create a hierarchical management structure.

Figure 7. Sample Asset record.

Use Case

Assets may be related to each other through two embedded tables called Upstream Assets and Downstream Assets. The default process is to manually link assets to their upstream assets, and this will automatically populate them as downstream assets from the parent asset.

34
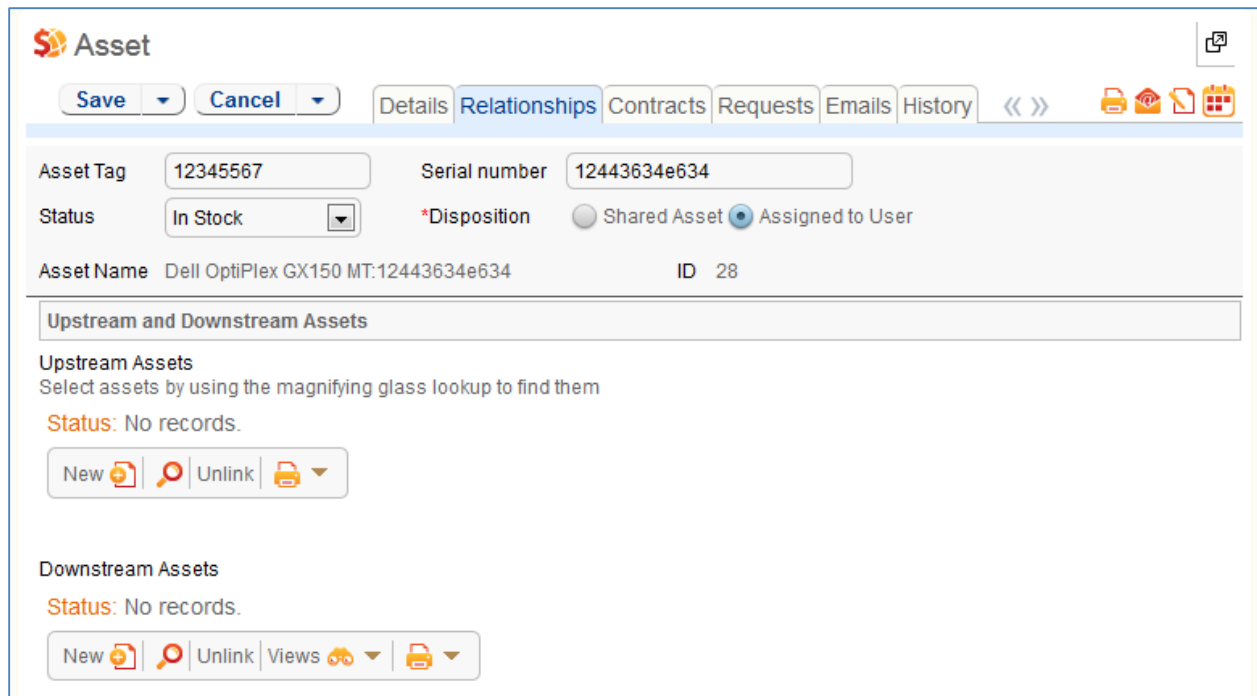
Figure 8. The Relationships tab shows upstream and downstream assets.

Assets may be linked to one or more contracts. They may also be associated with a particular company and owner or identified as shared assets.

Auto-Updating Asset Information

It is possible to set up auto-polling of asset information if your assets are Windows-based, using the built-in WMI data types. This is done by creating fields in either the asset table or the user table using the WMI data type to store the polled information. If done in the Asset table, then you would set up a time-based rule to poll and auto-update those fields on a regular basis. If done in the user table, the fields can be updated each time the user logs in to the system from that asset.

If you already have a third party asset polling system, it is possible to integrate this with Agiloft. One method is through time-based excel or ASCII exports/imports, which can be set up using standard rule actions.

Record Creation

Assets are typically initially created through an initial import of data from another system. They may also be created manually as new assets are purchased or installed.

Changes to existing assets may be made directly in the Assets table, or they may also be tracked and managed through Change Requests.

Processing of Records

Assets follow a lifecycle workflow from ordering through retirement. The workflow may be built out to trigger automatic actions when assets move from one state to another. Currently it is simply a general process flow.

Assets are created in the state of Installed/In Use by default (see Workflow diagram below). Assets that are requested but not immediately available might be created in a state of On Order, moved to In Stock when the asset is received, Pending Install while Operations is tasked with installing the asset, and finally Installed. Installed assets can change to In Maintenance for repairs and Retired or Stolen when the asset is no longer in use.

It is possible to automatically set an Asset's status to In Maintenance when a change request for that Asset is edited and the Start Clock button is pressed. This would simply require adding an update field action for the related Asset Status field to that action button field.

Ownership

Asset records are owned by the user whose Full Name matches the Owner Name field.

Automation

Edit: Actions triggered by web or API

Purpose: This handles all linked contract record actions when editing an Asset record.

Runs: When edited by web or email.

Search filter: None

Priority: 12

Actions:

I: edit actions by api or web

if (Latest Contract ID changed from: any value to: any value during record's last modification) {
    Update linked Contract to add this asset

TB: Reminder of Next Scheduled Due Date

Purpose: This handles notifications for Assets with Service dates.

Runs: At selected intervals, on Monday at 6 AM.

Search filter: R: Next Date of Service Within one Week

Priority: 2

Notes: This time-based rule is disabled

Actions:

E: Email Responsible Team of scheduled service

Workflow

The Assets table has the following default workflow:

Reports

The Assets table contains the following default Charts/Reports:

Models Table

The Models table holds specifications for each asset model. It is used to ensure consistency in the Assets table.

Use case

The Models table will hold the basic manufacturer, make and model information for assets that may be purchased from vendors and stored in the Assets table. Vendor information will be kept separate and indicated in the Asset record only, as a model may be sold by many vendors.

Figure 9. Sample Model record.

A model can be assigned to particular team that would be responsible for any issues pertaining to models assigned to them. If a Helpdesk Case is related to an Asset, the responsible team can be pulled into the Helpdesk Case and used in the assignment of the record. The responsible team can also be pulled into the Asset record along with the Model as the team responsible for general maintenance of the Asset.

Models will be associated with an Asset Type and Asset Subtype. This will be used for filters in the Asset table. When creating an Asset, the user will select an Asset Type and Asset Subtype. He will then be shown the active models that are associated with that Asset Type and Subtype.

Models have a status of Active or Inactive. Inactive models may be associated with existing assets but cannot be selected when creating a new asset.

Pricing information may be provided for Models to give a general idea of their cost; in case this table is also used as the basis for purchase requests. A purchase request system might allow requesters to select the model(s) they want to purchase and, based on the total price, determine who must approve the request.

Technician Record Submission

By default, Models can be created only by admin users and members of the Support Manager Group. Other groups that work with asset records will be able to view all active models only but will not see the table on their toolbar not be able to edit Models.

Ownership

Records in this table are owned by the user that created them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Software Apps Table

The Software Apps table is used to hold records for software applications used in the Assets table for purposes of managing licenses, utilization, upgrades, and service contracts.

Use case

The Software App table holds information on the manufacturer, application detail, and licenses for software that may be purchased from vendors and stored in the Assets table. Vendor information is kept separate and indicated in the Asset record only, as software applications may be sold by many vendors.

Figure 10. The default tab of a Software App record.

Software Apps can be assigned to particular team that would be responsible for any issues for applications assigned to them. If a Helpdesk Case is related to an Asset, the responsible team can be pulled into the Helpdesk Case and used in the assignment of the record. The responsible team can also be pulled into the Asset record along with the Software as the team responsible for general maintenance of the Asset.

Software Apps will be associated with an Asset Type of computer or data center and an Asset Subtype of PC, Laptop, Table or Server. When creating an Asset, the user will select an Asset Type and Asset Subtype. A related table will then be visible. Software Apps can then be linked to the Asset record.

Software Apps have a Status of Active or Inactive. Inactive applications may be associated with existing assets but cannot be selected when creating a new asset.

Pricing information may be provided for Software Apps to give a general idea of their cost, in case this table is also used as the basis for purchase requests. A purchase request system might allow requesters to select the Software Apps they want to purchase and based on the total price, determine who must approve the request.

Software Apps are used in Helpdesk Cases to help diagnose the specific problem with a software issue. In the Contracts table, Software Applications can be linked when the Asset Involvement for a Contract is for software applications. Software Apps are also used in Change Request when a request is related to a Software Application or both Asset and Software Application.

End User Record Submission

End Users will not be allowed to create Software Apps. They will have view access to Software titles for entering Helpdesk Cases.

Technician Record Submission

By default, Software Apps can be created only by admin users and members of the Support Manager Group. Other groups that work with asset records will be able to view all active Software Apps only but will not see the table on their toolbar not be able to edit Software Apps.

Ownership

Records in this table are owned by the user that creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Automation

Edit: License Counts

Purpose: This handles all license count updates based on number of licenses actively used.

Runs: When edited by web, email or API.

Search filter: R: License Count Changes

Priority: 10

Actions:

U: Update Number of Licenses Available

Updated Fields: Number of Licenses Available

Updated Values: $total_number_of_licenses - $number_of_licenses_actively_used

Reports

The Software Apps table contains the following default Charts/Reports:

Charts/Reports

Status: 20 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete   Views ▼

Edit View	Title ↑	Filter	Published	Date Updated	Output Format
	All Cases by Priority Funnel		Yes	Nov 29 2010 16:30	Graphical chart, HTML
	All cases by Workflow State / Priority		Yes	Jul 05 2010 15:28	Graphical chart, HTML, Excel
	All cases segmented by Type of Issue / Priority		Yes	Jul 05 2010 14:53	Graphical chart, HTML, Excel
	All Cases. Pie chart by Type of Issue		Yes	Jul 05 2010 14:50	Graphical chart
	Average elapsed time to close by Closed By person	All Closed Cases	No	Feb 16 2011 17:47	Graphical chart, HTML
	Average elapsed time to close for each month of past year	C: Date Closed in Past Year	Yes	Jul 02 2013 10:15	Graphical chart, HTML
	Average time spent by staff to resolve Cases by Type of Issue		Yes	Feb 16 2011 17:44	Graphical chart, HTML, Excel
	Cases closed each month of past year by Type of Issue	C: Date Closed in Past Year	Yes	Feb 16 2011 17:47	Graphical chart, HTML
	Gauges of open Cases by Priority	Not Closed	Yes	Feb 16 2011 17:43	Graphical chart
	My Assigned open Cases by Priority, funnel chart	My Assigned Support Cases	Yes	Feb 16 2011 17:45	Graphical chart, HTML
	Number of Cases closed by Person by Priority	All Closed Cases	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel
	Number of Cases closed each month of past year by Closed By	C: Date Closed in Past Year	No	Apr 17 2012 17:03	Graphical chart, HTML
	Number of Cases created each month of past year	C: Date Created in past year	Yes	Jul 05 2010 15:40	Graphical chart, HTML
	Number of Cases created in past 3 months segmented by Week / Priority		Yes	Mar 23 2012 11:49	Graphical chart, HTML, Excel
	Number of Cases created in past month by day/ Priority	Created in past month	Yes	Jul 05 2010 15:53	Graphical chart, HTML, Excel
	Open Cases by Assigned Person / Priority	Not Closed	No	Jan 25 2011 12:52	Graphical chart, HTML
	Reopened Cases for past year by Assigned To	C: Status changed to reopened in last 12 months	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel
	Summary of Support Case activity		Yes	Feb 16 2011 17:33	HTML
	Trend of Cases. Segmented by Type of Issue		Yes	Jul 05 2010 15:57	Graphical chart
	Trend of Support Cases submitted per month for past 6 months. Segmented by Type of Issue		Yes	Jul 05 2010 16:00	Graphical chart, HTML, Excel

REPAIR REQUESTS TABLES

Repair Requests Table

The Repair Requests table is used to hold and manager requests for repairs. There is a one-to-one correlation of repair request to RMA number.

Use Case

End User Record Submission

If the Repair Request is created by a customer directly, the request will be created in the default Status of Pending Approval. This will allow support to review the request prior to providing the customer with the RMA number. On submission, a confirmation email will be sent to the customer and an email will be sent to the Assigned To (Repair Team by default) notifying them of the assignment.

Technician Record Submission

Staff users can create a repair request directly on behalf of a customer for whom there is no Support Case. If the Staff User changes the Approved field to Yes, a rule will run to update the Status automatically to Pending Part Return.

Figure 11. Sample Repair Request record.

Requests created from Support Cases

Repair Requests may be created by staff members from within the Support Case table. Repair Request fields are only visible when the Support Case's Type of Problem selected is Equipment Problem. The request is created by clicking the Save Changes and Copy to Repair Request action button. Using a conversion action, this will bring up, interactively, a new Repair Request record with an automatically assigned ID (the RMA number given to customers) and will map the customer name, Support Case ID, Contract and Company info and any Additional Notes or Staff Only Notes into the Repair Request. On the creation of the Repair Record, a rule will run to link the ID (RMA number) of the Repair Record back in the Support Case from which it was spawned.

If the request is created by a Staff User using a conversion action in a Support Case, the request will be will be created in a Status of Pending Part Return, the Approved field set to Yes and the Support Case Status will be changed to Pending Part Return. If the Assigned To is not the creator or the creator's team, an email will be sent to the Assigned To notifying them of the assignment.

If the Request Type is Repair or Replace, a confirmation email will automatically be sent to the user with the RMA number and instructions to return the defective part. If the Request Type is Cross-Ship, a confirmation email indicating a replacement part has been shipped along with a RMA number and instructions to return the defective part will be sent automatically. If the Date Parts Shipped is not filled in at this time, the next staff user who edits the request will be required to supply the date shipped. If the Request Type is Credit, a confirmation email with a RMA number indicating that the customer's account will be credited once a defective part has been returned.

Processing Records

By default, Repair Requests are assigned to the Repair Team. They can also be assigned to a specific individual. If the request was created directly by a customer, the request will require review and approval.

Following approval, the staff member will determine the Request Type of Repair, Replace, Cross-Ship or Credit. If the Request Type is Repair or Replace, a confirmation email will automatically be sent to the user with the RMA number and instructions to return the defective part. If the Request Type is Cross-Ship, the Staff User will be required to enter a ship date. Additionally, a confirmation email indicating a replacement part has been shipped along with a RMA number and instructions to return the defective part will be sent automatically. If the Request Type is Credit, a confirmation email indicating that the customer's account will be credited along with a RMA number and instructions to return the defective part. The Status will automatically be set to Pending Part Return.

If Repair Team rejects the request, the Status is changed to Denied and a notification is sent to the customer informing them that their request has been denied with the supporting information.

Once the parts to be repaired are received, the Status is changed to In Repair and the Date Parts Received is updated if it has not been previously added. If the request was created from a Support Case, a rule runs to update the Support Case Status to In Repair. If the Request Type is Repair or Replace, an email notification will be sent to the customer acknowledging receipt of the part and indicate that a repair or replacement part will be shipped. If the Request Type is Cross-Ship or Credit, a closing email notification will be sent to the customer acknowledging receipt of the part. At this point, the support technician is required to create at least one Repair Items for the Repair Team. A separate Repair Items task is required for each part to be repaired.

When the Number of Completed Repair Items is equal to the Number of Repair Items, the system will notify the Assigned To person/team (requires a search of one or greater so that it doesn't find requests with no tasks). Additionally, the system will notify the assigned person/team of the Support Case that the repairs have been completed.

Once all repairs tasks are completed, the assigned person/team will change the Status to Closed and the Resolution Type must be set. If the Resolution Type is Parts Repaired, Parts Replaced, or Some Replaced and Some Repaired, a notification is sent to the customer informing them that their repaired or replacement part has been shipped. If the Request Type is Cross-Ship or Credit, no notifications will be sent to the customer. If the Resolution Type is anything other than Resolved without Repair or Denied, the Date Parts Shipped must be updated.

Time keeping is enabled so that when editing a Repair Request, a staff person can put time spent into a Time Spent field and a description into the Time Description field, and this will automatically create a Time Entry record associated with the case when he saves his changes. All time records are shown on the Time tab in the Repair Request, along with a running total of time spent, including Repair Task time entries. Time reports may be run on the Time Entry table.

Ownership

Records in this table are owned by the customer indicated in the request. Specifically, a record is owned by the user whose Login matches the Customer Login field.

Automation

Create: New Repair Request actions

Purpose: This handles all notifications, time conversion and status updates for new Repair Requests.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

```
if ((Status='Pending Part Return' or Status='Pending Approval') and Creator Team!~='Customer') {
        if (Request Type='Replacement' or Request Type='Repair') {
                Email customer with RMA for Replace or Repair
        } else if (Request Type='Cross-Ship') {
                Email customer with RMA for Cross-Ship
        } else {
                Email customer with RMA for Credit
        }
}
if (Status='Pending Approval' and Creator Team='Customer Team') {
        Email customer with reciept confirmati
}
if (Time Spent!=NULL) {
        Convert to Time Entry
        Set Time fields to empty
}
if (Creator Team='Customer Team' or Assigned To!='$_1880_full_name' and Assigned To!='$creator_team') {
        Email Assigned To of New Repair Request
}
if (Approved?='Yes' and Status='Pending Approval') {
        Set status to Awaiting Part Return
}
if (Spawning SC ID!=NULL) {
        Update Linked SC with RR ID
```

Edit: All customer update actions

Purpose: This handles all notifications after customer updates.

Runs: When edited by web or email.

Search filter: R: Updater Team is customer or updater is customer login

Priority: 1

Actions:

I: Customer Update Ticket Actions

```
if (Assigned To!=NULL) {
        Email Assigned To of Customer Update
```

Edit: All edit actions – no api

Purpose: This handles all notifications, time conversion and request approvals for repair requests.

Runs: When edited by web, email or API.

Search filter: R:Updater not customer and not customer team member

Priority: 1

Actions:

I: All edit actions

```
if (Assigned To changed from: any value to: any value last user's modification and Assigned To!='$_1888_full_name' and Assigned
To!='$updater_team') {
        Email Assigned To when case is reassigned
}
if (Time Spent!=NULL) {
        Convert to Time Entry
        Set Time fields to empty
}
if (Additional Notes changed from: any value to: any value last user's modification) {
        Email customer updated additional notes
}
if (Number of Repair Items>0 and Number of Completed Repair Items='$number_of_repair_tasks' and (Status='In Repair' or
Status='Pending New Parts')) {
        Notify Assigned To Tasks Completed
        if (Spawning SC ID!=NULL) {
                if (SC Assigned Person!=NULL) {
                        Notify SC Assignee Repair Tasks Complete
                } else {
                        Notify SC Assigned Team Tasks Complete
                }
        }
}
if (Status='Closed') {
        if ((Resolution Type='Parts Replaced' or Resolution Type='Parts Repaired' or Resolution Type='Some Replaced and Some
        Repaired') and Request Type!='Cross-Ship' and Request Type!='Credit') {
                Email customer repaired part shipped
        }
}
if (Status changed from: 'Pending Part Return' to: 'In Repair' during record's last modification) {
        if (Spawning SC ID!=NULL) {
                Update parent request status to In Repair
        }
        if (Date Parts Received=NULL) {
                Update Date Parts Received
```

I: Request Approvals and Denials

```
if (Approved? changed from: any value to: 'Yes' last user's modification and Status='Pending Approval') {
        if (Request Type='Replacement' or Request Type='Repair') {
                Email customer with RMA for Replace or Repair
                Set status to Awaiting Part Return
        } else if (Request Type='Cross-Ship') {
                Email customer with RMA for Cross-Ship
                Set status to Awaiting Part Return
        } else {
                Email customer with RMA for Credit
                Set status to Awaiting Part Return
        }
} else if (Approved? changed from: any value to: 'No' last user's modification) {
        Email customer request has been denied
```

Edit: All validation actions

Purpose: This handles all validations for repair requests.

Runs: When edited by web or email.

Search filter: None

Priority: 1

Actions:

> ### *I: All validation actions*
>
> ```
> if (Status!='Pending Approval' and Status!='Pending Part Return' and Status!='Closed' and Number of Repair Items<1) {
>       must have at least one task
> }
> if (Status='Closed') {
>       if (Resolution Details=NULL) {
>             must update resolution details
>       }
>       if (Resolution Type!='Resolved without Repair' and Resolution Type!='Denied' and Date Parts Shipped=NULL) {
>             must update date shipped
> ```

Workflow

The Repair Requests table has the following default workflow:
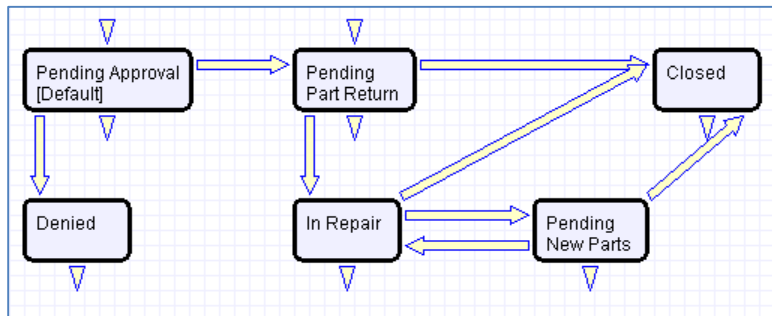
Reports

The Repair Requests table contains the following default Charts/Reports:

Repair Items Table

The Repair Items table is used to manage each repair item that is part of a repair request. It will identify the part that is being repaired, Repair Status, and the Repair Assignee.

Figure 12. The default tab of a Repair Item record.

Use Case

Record Creation

Repair Items will be created by staff members when parts are received by clicking an action button that runs an interactive Repair Item conversion action. They will create a repair item for each part. Note that with some restructuring of the setup, it is possible to automatically generate multiple tasks for specific selected sub components of an assembly. Repair Items will be created in the default state of Received/In Progress. By default, Repair Items are assigned to the Repair Team.

If the creator is not the Assigned To or is not a member of a team selected as Assigned To, an email will be sent to the Assigned To notifying them that a Repair Item has been assigned to them.

Processing Records

When a new part is required to complete the repair, the staff person will change the Status of the Repair Item to Pending New Part. They will be required to provide a Parts Follow-Up Date before saving the record. A notification will be sent to the assignee on the follow-up date as a reminder. Additionally, a rule runs to update the Status of the parent Repair Request to Pending New Part.

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If the Assigned To changes from any value to any other value and the update is made by someone other than the new Assigned To person or a member of the new Assigned To team, an email notification is sent to the new assignee

When the repair is completed on an item, the assigned person/team will change the Status to Completed and the Disposition field must be set. The Disposition type will be filtered based on the Repair Type. This will initiate a rule to update the Number of Completed Repair Items field in the parent Repair Request. If the Disposition is Replaced and Repaired or Replaced and Disposed, the Replaced by Part Serial Number must be set.

Time keeping is enabled so that when editing a Repair Item, a staff person can put time spent into a Time Spent field and a description into the Time Description field, and this will automatically create a Time Entry record associated with the case when he saves his changes. Time records are shown on the Time tab in the Repair Item, along with a running total of time spent. Time reports may be run on the Time Entry table. These entries will roll up into the Repair Request.

Ownership

Repair Items records are owned the user who creates them.

Automation

Create: All creation actions

Purpose: This handles all notifications and time conversion on creation of a repair task.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

I: All create actions

```
if (Assigned To!=NULL and Assigned To!='$_1880_full_name' and Assigned To!='$creator_team') {
    Email Assigned To of New Repair Task
}
if (Time Spent!=NULL) {
    Convert to Time entry
    Set Time fields to empty
}
```

Edit: All edit actions

Purpose: This handles all parent Repair Request actions, notifications and time conversions of repair tasks.

Runs: When edited by web, email or API.

Search filter: None

Priority: 1

Actions:

```
if (Status changed from: any value to: 'Pending New Part' last user's modification) {
        Update parent request status to Pending New Part
} else if (Status changed from: any value to: 'Completed' last user's modification) {
        Update parent request number of completed tasks
}
if (Assigned To changed from: any value to: any value last user's modification and Assigned To!='$_1888_full_name' and Assigned
To!='$updater_team') {
        Email Assigned To when task is reassigned
}
if (Time Spent!=NULL) {
        Convert to Time entry
        Set Time fields to empty
```

TB: Pending New Part Reminder

Purpose: This handles follow-up notifications for new parts.

Runs: At selected intervals, every 2 days at 6 AM.

Search filter: R: Part Follow-Up Date <= Today

Priority: 1

Actions:

E: Notify Assigned To Follow-Up on New Parts

Notes: This time-based rule is disabled. If used, this rule will need to be rescheduled to run daily.

Workflow

The Repair Items table has the following default workflow:
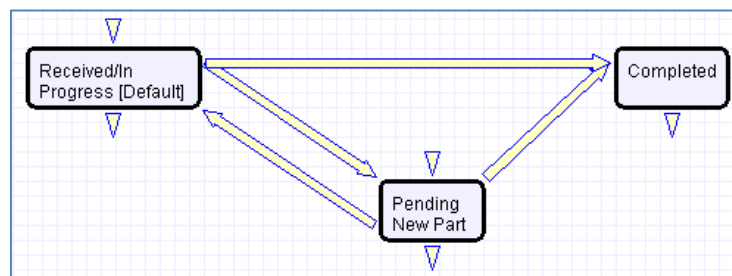
CONTRACT MANAGEMENT TABLES

Overview

The Contract Management system is designed with a variety of approval processes built in. It is easy to eliminate or modify any functions to better fit a desired business process.

This section describes the default configuration of the contract management system and gives some instructions on how to make the most common modifications.

The Contract Management system is comprised of a few main process tables such as Contracts, Attachments, and Approvals. Background tables like Contract Types and Workflows play a supporting role.

The system is preconfigured to the extent possible for integration with DocuSign. This means that tables for managing DocuSign users, roles, envelopes, and recipients are present, though hidden from all users except members of the admin group and a special group called DocuSign User.

If you do not plan to use DocuSign, you can hide the tables from the admin group as well and remove any fields from the Contract layout. If you do plan to use DocuSign, you can add any users who should see the DocuSign-related tables and fields to the DocuSign User group as well as any other group appropriate for them.

Contracts Table

The Contracts table holds all contract records. It also controls all associated automation and notifications related to contracts. A representative record is shown below.

Figure 13. Sample Contract record.

Required fields, marked with a red asterisk, are: Record Type, Internal Contract Owner, Contract Type, Days in Advance to Notify for Renewal, Contract Title, Contract Description, Contract Start Date, and Contract End Date.

Staff Use Case

This section covers the use case for staff members inside Agiloft.

Each record in the table holds information about an individual contract including details about the contracting party, approval information, attached contract file and supporting documents, and renewal details.

Contract Creation

Contract records may be created by members of the Admin, Contract Creator, Contract Manager, and Contract Owner groups.

Contracts may be created in one of two ways:

- Click New in the Contract table action bar

- Use the Create Related Contract button on the Renewal / Related Contracts tab to create a renewal, subcontract, or amendment from the current contract. This button is available only if the contract is in a Status of Signed, Active, Expired, or Canceled. Creating a new contract with the Create Related Contract button will automatically link it to the current contract by populating the Parent Contract ID field in the newly created record. For a more detailed explanation of creation by this method, see the HANDLING RELATED CONTRACTS section.

Contracts fall into one of four categories:

- Contracts

- Master Agreements

- Subcontracts

- Amendments

The Record Type field in the common area indicates the contract's category. "Contract" is the default Record Type for newly created contracts. It can be used to indicate either a stand-alone contract or a contract that exists under a master agreement. In the latter case, the Parent Contract ID can be filled in upon creation of the contract. Subcontracts and Amendments will be linked to a parent contract automatically, if they are created by clicking the Create Related Contract button in the parent contract record.
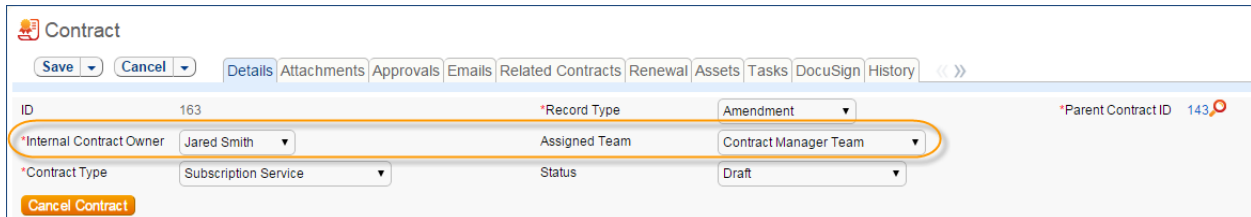
Figure 14. The type of contract is shown in the Record Type field.

Below the Record Type are fields storing the Assigned Team and the Internal Contract Owner. The default Assigned Team is the Contract Manager Team. The Internal Contract Owner is the person responsible for overseeing the contract and ensuring timely renewals and approvals. The list of available owners is filtered to users who are in the Contract Owner Team or the Contract Manager Team. The default Internal Contract Owner is the user who creates the contract record, provided that user is in the Contract Manager or Contract Owner Team. Users in the Contract Manager or Admin group can manually change the Assigned Team and Internal Contract Owner if needed.

Figure 15. The Internal Contract Owner is responsible for overseeing the contract.

Once the appropriate fields are filled in, the contract may be saved in a Status of Draft.

The contract's Status field is changed automatically by the system at appropriate points in the workflow, generally when an action button is pressed or when some condition is met; however, users in the Admin group can manually override the Status if necessary.

Information about the contract requester, external company involved, and locations related to the contract may be added by clicking the lookup icon next to those fields. If a desired Requester, Company, or Location does not exist, a record must first be created in order to link it to the Contract.

Creating contract attachments from default print templates

The Attachments tab shows all attached files related to the contract and provides the user with options to create and edit related attachments. For certain contract types, when the Document Source is set to Standard Template or Modified Template, the Print Template to Generate field appears. The Document Source can also be set to 3rd Party or Internal – Other to indicate a document provided by the external contract party, or which has been internally generated but not from a template, respectively. The Print Template to Generate has a default value set based on the contract type. The Create and Attach action button is used to auto-generate a contract document from the MS Word print template specified in the Print Template to Generate field and stored in the Print Template File field. Clicking Create and Attach generates the document and then creates an attachment record to hold the attached file. It also increments the Version Number field.

Creating contracts and attachments from inbound emails

Attachments can be automatically generated from inbound emails containing attached files. Files from inbound emails are mapped to the Transitional Contract Files field in the contract, assigned a predetermined Attachment Title and Attachment Type value, and then converted into a new attachment record. The file is mapped into the Attached File field in the attachment record. If multiple files are attached to an inbound email, each one is converted into a separate attachment record for that contract.
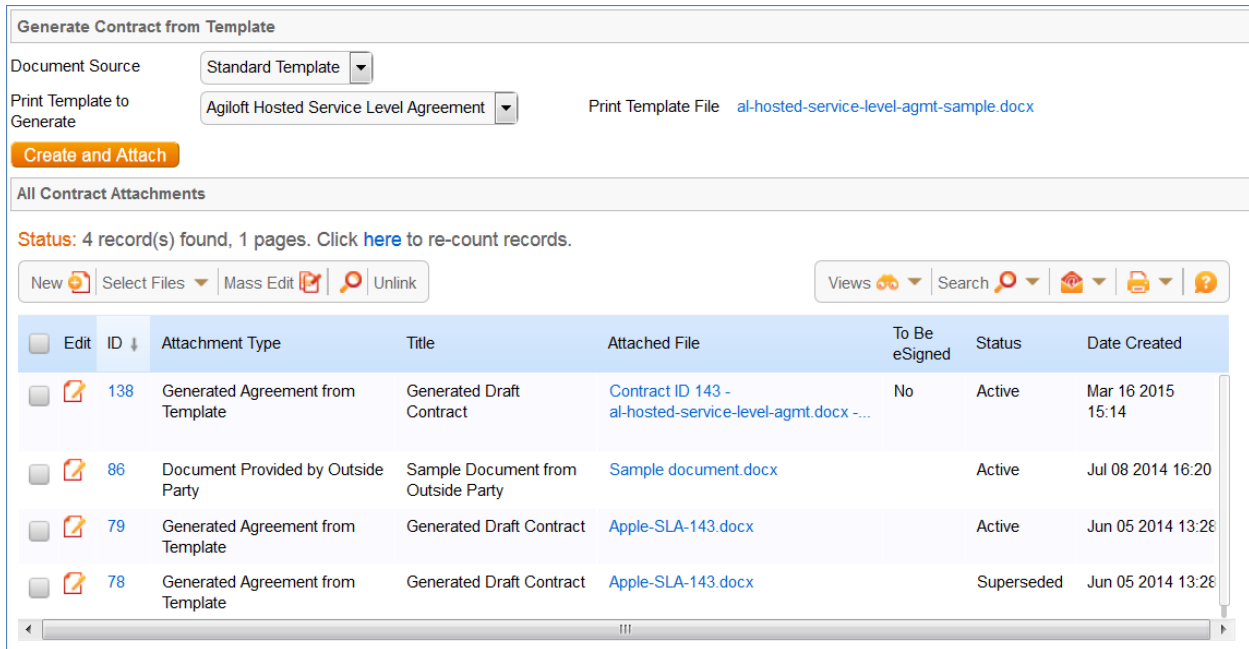
Figure 16. Attachments are managed and created on the Attachments tab.

Working with attachments

The All Contract Attachments related table is also used to manually create and attach files to the contract, such as insurance certificates, performance bonds, and signed agreements. Create attachments from within the contract record by clicking New on the related table's action bar.

The Select Files > Add/Remove from DS Envelope actions on the action bar can be used to add or remove selected attachments to and from the DocuSign envelope. When these actions are selected, the To Be eSigned field is set to Yes or No, and the DS Files to Sign field on the DocuSign tab is updated with the attachments. The Select Files > Supersede File actions set the Status of the selected file to Superseded.
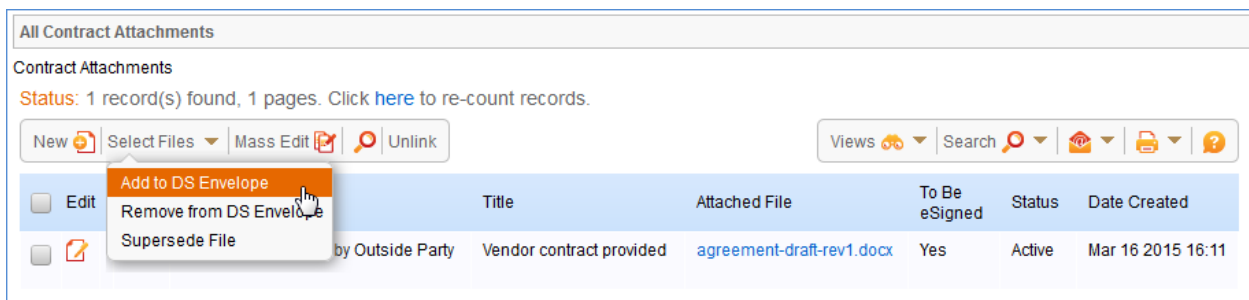
Figure 17. Attachments can be added or removed from the DocuSign envelope before sending.

For more information on Attachments, refer to the ATTACHMENTS TABLE section.

Adding notes and sending emails

Notes relevant to the general contract process are entered into the General Notes field on the Details tab, and notes pertaining to the approval process are entered into the Approval Notes field on the

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Approvals tab.

Figure 18. The Approval Notes field shows notes from all approvers for the contract.

Emails can be sent to Internal Contacts and External Party Contacts from the Emails tab. First choose the type of Recipient(s) (Internal Contacts, External Party Contacts, or External Party and Internal Contacts), then click the lookup icon to select which contacts to email. Fill out the Email Subject and Email Text fields as needed, select any files to send with the email, then click Send Email.

Figure 19. The Emails tab provides a way to send email to contract parties and include attached files. It also shows all previous related emails.

Renewals and previous contracts

Information about the renewal process is stored on the Renewal / Related Contracts tab. Fields for capturing the Renewal Notification Date and Days in Advance to Notify for Renewal are provided as a default. If relevant, information about the renewal contract or previous contract are automatically updated by the system. Users typically do not manually link contracts.

Related assets

Assets can be linked to individual contracts from the Assets tab. Assets must be added separately to the Assets table before they are available to attach to contracts.

Figure 20. Assets related to the contract are managed on the Assets tab.

Depending on the selection in the Asset Involvement field, different fields appear for the user to input linked assets.

Figure 21. For software assets, fields such as Software Title/Version and Software Manufacturer appear.

For hardware assets, select "For One or More Assets". For software assets, choose "For Software Application". For contracts with no linked assets, use "No Assets" from the Asset Involvement drop-down.

Signing contracts with DocuSign

A Signature tab appears to the right of the Assets tab. This tab contains fields for contract document Signers, and contains all fields related to DocuSign. The DS Files to Sign field holds attached files from the Attachments table that have a To Be eSigned value of Yes. The Refresh Files action button refreshes this field in case changes to the attachments were made in the same session under the contract's Attachments tab.

Fields under the Signers heading are used to populate the signature page of the contract's print templates and to add DocuSign tags if the contract uses DocuSign.

Once the contract is ready to sign, use the Create DocuSign Envelope action button to create a DocuSign Envelope record and attach the files held in the DS Files to Sign field. It also creates a DocuSign Recipient record for each signer. These records are then shown in the related tables for DocuSign Envelopes and DocuSign Recipients on the Signature tab. Only users in the Admin and DocuSign Users groups can access the DocuSign fields on the Signature tab. For more information on DocuSign, refer to the DOCUSIGN TABLES section and the detailed DocuSign User Manual at http://www.agiloft.com/documentation/docusign-users-manual.pdf.

DocuSign Files

| DS Files to Sign | Acme Micro-support contract-3.docx 🔍 | | Refresh Files |

Signers

Internal Signer	Martin Brentman ▾		Internal Signer Email	mbrentman@example.com	🔍
Internal Signer Title	🔍		Internal Signer ID	415 🔍	
1st Party Signer Name	Maurice Sendak	🔍	1st Party Signer Email	example26@example.com	🔍
1st Party Signer Title	Engineer	🔍	1st Party Signer ID	391 🔍	
2nd Party Signer Name	Weston Presley	🔍	2nd Party Signer Email	example41@acme.com	🔍
2nd Party Signer Title	Director of Purchase	🔍	2nd Party Signer ID	403 🔍	

DocuSign Envelopes

Create DocuSign Envelope

DocuSign Envelopes

Status: 1 record(s) found, 1 pages. Click here to re-count records.

	Edit	Status	Envelope	Subject	Sender	Linked Record	Attached Documents	Create & Preview	Send	Signed Documents
☐	✎	Draft		Annual support contract for Acme	Agiloft System	contract/3	Acme Micro-support contract-3.docx	Create & Preview	Send	

DocuSign Recipients

DocuSign Recipients

Status: 3 record(s) found, 1 pages. Click here to re-count records.

	Edit	ID	Send Order ↑2	Status	Full Name	Email	Title	Role Name	Message	Envelope
☐	✎	1	1	Draft	Martin Brentman	mbrentman@example.com		InternalSigner		
☐	✎	2	2	Draft	Maurice Sendak	example26@example.com	Engineer	Customer1		
☐	✎	3	3	Draft	Weston Presley	example41@acme.com	Director of Purchase	Customer2		

Figure 22. Contract signers and DocuSign envelopes are managed on the Signature tab.

Handling Approvals

The order and nature of approvals depends on the Workflow Title selected on the Approvals tab. Selecting a Contract Type in the common area filters the available Workflow Title choices. For

information on setting up the individual Workflows, refer to the WORKFLOWS TABLE section.

Figure 23. The Contract Type filters the available workflows.

To submit a contract for approval, first select the correct Workflow Title from the drop-down provided. Click Create Approvals to generate a set of Approval records in a Status of Queued. Once the records have been created, click Launch Approval Process to update the Status of the contract to Pending Approval and update the Status of the approval(s) with the lowest step number to Pending Approval. There may be more than one approval in the lowest step number for parallel approvals.

Figure 24. Select the Workflow Title to choose the series of approvals needed.

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Figure 25. After creating approvals, click Launch Approval Process to notify the first approvers.

The system automatically notifies the first approver in the sequence. A progress bar also appears in the common area to provide a quick visual reference of the approval process.

Figure 26. The common area shows a progress bar of the approval process.

To advance the contract workflow, an approver will use one of three action buttons to change the Status of the approval record:

- Approve to send the contract to the next approver in the sequence.
- Require Changes to send the contract to the previous approver for changes.
- Permanently Reject if the contract requires significant changes.

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Figure 27. Approvers use one of three action buttons to chnage the status of their approval record.

Both Require Changes and Permanently Reject require the user to enter notes in the Approval Notes field. These notes are appended to the Approval Notes field in the contract record and are also viewable from any other approval record linked to that contract.

As each Approval is approved, the system notifies the next approver in the sequence that a contract is pending their approval. A list of all approval records is displayed under the Approvals Needed subsection and automatically updated as approval records are modified.

If a user who is not on the current approval team attempts to approve a contract, the system recognizes the error and prevents the user from completing the approval action.

When all the required approvals are received by the system, the contract Status is automatically changed to Approved.

Handling Related Contracts and Renewals

Related contracts are handled in the Renewal / Related Contracts tab of a contract record.

To create a related contract, select the New Record Type of the contract. The choices in the drop down are filtered by the Record Type of the originating contract. These fields are visible only when the contract's Status is Active, Canceled, Expired, or Signed. Clicking Create Related Contract maps relevant

information from the current contract into the new one.

Figure 28. To create a related contract, select the New Record Type and click Create Related Contract.

If the new contract is a renewal, click Create Renewal Contract on the Renewal / Related Contracts tab of the parent contract. This button is only visible when the contract's Status is Active, Canceled, Expired, or Signed. A new contract generated in this way can be edited before saving.

If applicable, the system automatically links renewal contracts to any preceding contracts, creating a chain for auditability. Any assets linked to the preceding contract will be linked to the renewal contract as well. This information and related information on the contract process for renewals are stored in the Renewal / Related Contracts tab. Users typically do not enter information into the Renewal Contract and Previous Contract Information fields manually.

Figure 29. Renewed contracts show details about the previous contract on the Renewal / Related Contracts tab.

Contract Processing

This section covers the remaining Status changes not mentioned in the explanations above.

Once a contract changes to a Status of Signed, the system automatically updates the contract to a Status of Active when the Contract Start Date occurs.

Similarly, the Status is changed when the Contract End Date occurs. If the contract does not have an associated renewal contract, the Status is automatically set to Expired; if the contract does have a renewal, the Status is set to Renewed. If the contract is auto-renewing, the Contract End Date is increased by the Renewal Term in Months and the contract remains Active.

To cancel a contract, click the Cancel Contract button in the common area. Additionally, users of the Admin group can manually change the contract status to Canceled.

Figure 30. Cancel Contract appears in the contract common area.

If the contract has a Status of Approved, the Mark as Signed button is visible in the common area. This button updates the contract Status to Signed.

Figure 31. The Mark as Signed button is a quick way to change the status to Signed.

Turning Off Approvals

Contract Management tables have Approval handling set up by default. The associated processes may be turned off in order to use Agiloft as a contract repository. To turn off Approvals, do the following:

1. Edit field permissions to allow the Contract Manager Group to edit the Contract Status field in their own contracts and in others' contracts.
2. Remove status-changing buttons from the layout: Submit for Approval and Mark as Signed.
3. Remove the Approval tab and related fields from the layout.

For help on configuring table layouts, please refer to the Administrator Reference Manual or online help.

End User Use Case

This section covers the use case for end users in a Contract Management context.

Members of the Contract Creator group are internal employees accessing the system via the end user interface. Contract creators, also called contract requesters, are users who submit requests for contracts

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but do not work on other users' records. Below is a representative home page for an end user in the Contract Creator group.
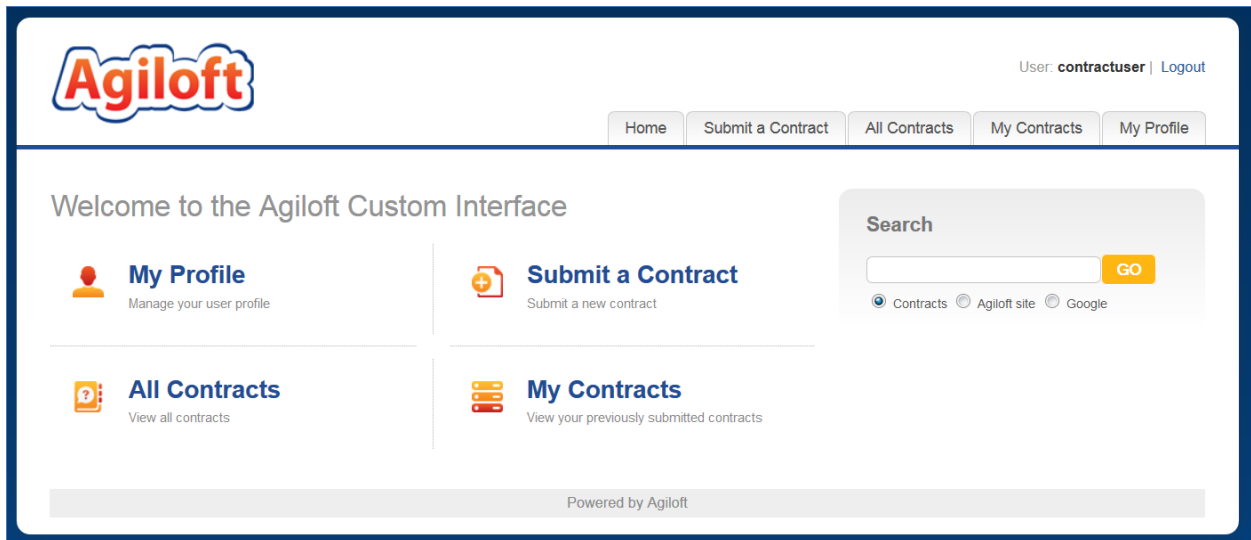
Figure 32. Home page for Contract Creators in the default end user interface.

Contract Creation

Users in the Contract Creator group may create contracts by clicking the Submit a Contract link or tab on the home page. A simplified contract form is presented to the end user. Many of the fields are hidden from the layout or restricted by field-level permissions.

Figure 33. Contract Creators see a simplified contract form in the EUI.

Once the required information is filled in, the contract can be saved for later revisions. The contract requester can also press the Submit for Review button to request approval from a Contract Manager. Contract requesters can be contacted to update the submitted contract, but they are typically no longer involved in the approval process from this point forward.

After the contract requester submits the contract for review, a contract manager decides whether to continue with the approval process or reject the contract request.

Working with Contracts

At any time, the contract requester can view contracts they previously submitted by clicking the My Contracts tab. Contract Creator group members can edit select fields in contracts they own. Certain fields such as Contract Amount, Contract Start Date, and Contract End Date (among others) are not editable by the contract requester if the contract's Status is Pending Approval, Approved, Signed, Active, Renewed, or Expired. This is to prevent changes to currently active or in process contracts.

The contract requester can view all contracts they have permission to see by clicking on the All Contracts home page link or tab.

Ownership

Records in this table are owned by the Contract Requester. Specifically, a record is owned by the user whose ID matches the number in the Requester ID field. By default, the Contract Requester is the user who created the contract record.

Automation

The Contracts table has the following rules set up. Rules which are run based on a schedule (rather than those which are event-triggered) are identified by the prefix "TB", for time-based.

Create: All New Contract Actions

Purpose: This rule handles all update and linking actions upon creating a new record.

Runs: When created by web or API.

Search Filter: None.

Priority: 1

Actions:

I: All New Contract Actions

```
// Link assets of previous contract to renewal contract and update previous contract's Renewal Contract ID:
if (Previous Contract ID!=NULL and Renewal Contract='Yes') {
        // There is a previous contract
    if (Asset Involvement='For One or More Assets') {
            Copy contract id to latest contract id in assets
            // this causes assets for old contract to be linked to this one
    }
    Copy contract id to previous contract Renewal Contract Id
}
// Prevent the end date from being before the start date:
if (Contract Start Date!=NULL and Contract End Date!=NULL and Contract End Date<'$contract_start_date') {
    contract end date can't be less than start date
}
// Set the contract to Active if the start date has arrived and the end date is in the future:
if (Status='Signed' and Contract End Date>1 day in the future and Contract Start Date>1 minute old) {
    Set Status to Active
}
// Refresh the contracts linked within all insurance certificates that exist for the contract company:
if (Company ID!=NULL) {
    Set Default Contracts in Ins Certs for Contract Company
}
```

I: Set Renewal Notification Date based on Renewal Type

```
if (Renewal Type='Auto-Renewing' and Advance Notice Required to Cancel Autorenewal (days)!=NULL) {
    Set notification date for autorenewing contract
} else if (Contract End Date!=NULL) {
    Set Renewal Notification Date
}
```

Create/Edit: If Transitional Contract Files field has value, convert to Attachment

Purpose: This rule handles notifications for Contracts that are updated by an outside party without direct access to the system, as well as the Attachment Type and Attachment Title for inbound files

Runs: When edited by email, web or API.

Search Filter: R: Transitional Contract Files field changed

Priority: 15

Actions:

C: Convert to Attachment

Summary: This converts the values in the Transitional Contract Files, Transitional Attachment Title, and Transitional Attachment Type fields into a new Attachment record and links it back to the Contract via the Contract ID.

U: Blank out Transitional Contract Files field

Summary: This erases the Transitional Contract Files, Transitional Attachment Title, and the Transitional Attachment Type fields after the conversion has taken place.

Edit: Updates by Party

Purpose: This rule handles notifications for contracts that are updated by an outside party without direct access to the system, as well as the Attachment Type and Attachment Title for inbound files.

Runs: When edited by email or web.

Search Filter: R: Updates by Vendor or Customer Team

Priority: 1

Actions:

E: Email Owner and Contract Manager Team of Outside Party Update

Sent To: Contract Manager Team, Internal Contract Owner, Sent to Party By.

Summary: This email notifies the relevant users that an outside has updated the contract.

I: Handle Inbound Files

```
if (Transitional Contract Files changed from: any value to: any value last user's modification and Transitional Contract
Files!='NULL') {
     Set Attachment Type and Title for Outside Party Update
}
```

Edit: Most Edit Actions by Web or API

Purpose: This rule handles the processes resulting from changes made by staff or rules.

Runs: When edited by web or API.

Search Filter: None.

Priority: 2

Actions:

I: All Edit Actions with API

```
if (Number of Approvals Needed='$number_of_approvals_completed' and Number of Approvals Needed>=1 and Status='Pending Approval') {
      Set status to Approved
      Email Contract Owner of approved contract
}
if (Status changed from: any value to: 'Signed' last user's modification and Contract Start Date>=1 minute old and Contract End Date>1 day in
the future) {
      Set Status to Active
      Update Company to refresh latest contract
}
if (Update DS Files to Send Flag='Yes' or Number of DS Files changed during record's last modification) {
      Update DS Files to Sign
      Set Update DS Files Flag to No
}
if (Status changed from: any value to: any of 'Renewed','Expired','Canceled' last user's modification) {
      Set Linked Attachments' Status to Contract Inactive
      Set Alert Color to Grey
      if (Status='Canceled') {
            Set Queued and Pending Approvals to Not Needed
            Set Planned and Pending Contract Tasks to Canceled
      }
}
if (Number of Approvals Completed changed during record's last modification or Number of Approvals Needed changed during record's last
modification) {
      Update Progress Image
}
if (Status changed from: 'Pending Approval' to: 'Draft' during record's last modification) {
      Set Approved Approvals to Queued and Clear Approval Notes and Date Approved
}
if (Status changed from: any value to: 'Active' during record's last modification) {
      Update Company to refresh latest contract
}
```

Edit: Update Renewal Notification Date if underlying fields change (web)

Purpose: This rule updates the Renewal Notification Date if the Contract End Date, Days in Advance to Notify for Renewal, or the Advance Notice Required to Cancel Autorenewal (days) change.

Runs: When edited by web

Search Filter: R: End Date, Days in Advance, Advanced Notice to Cancel, or Renewal Type changed last user mod

Priority: 3

I: Set Renewal Notification Date based on Renewal Type

```
if (Renewal Type='Auto-Renewing' and Advance Notice Required to Cancel Autorenewal (days)!=NULL) {
      Set Notification Date for Autorenewing Contract
} else if (Contract End Date!=NULL) {
      Set Renewal Notification Date
}
```

I: Set Alert Color based on Renewal Notification Date

```
if (Renewal Notification Date>1 minute old and Alert Color!='Red') {
      Set Alert Color to Red
} else if (Renewal Notification Date>1 minute in the future and Alert Color='Red') {
      Set Alert Color to Default
}
```

Edit: Warn if Renewal Notification Date is in the Past (web, API)

Purpose: This rule warns the user, but allows passthrough, if the Contract End Date, Days in Advance to Notify for Renewal, or the Advance Notice Required to Cancel Autorenewal (days) has changed such that the Renewal Notification Date is set to a date in the past.

Runs: When edited by web or API or by other rules during record creation.

Search Filter: R: Renewal Notification Date is less than or equal to Today and just changed

Priority: 4

V: Renewal Notification Date is in the past

Edit: Refresh Approvals when Number of Approvals Needed Changes (web, API)

Purpose: This handles the recalculation of next steps and concurrent approvals when additional approvals are added or removed. This rule will update the Lowest Step, Next Step Number, Concurrent Approvals, and Next Approvals fields in all linked approval records. The linked record action uses a chain through the Latest Contract ID to reach the linked approvals and then runs several update field actions, each of which is based on a saved search.

Runs: When edited by web or API

Search filter: R: Number of Approvals Needed Changed last modification

Priority: 10

L: Run Contract Creation Actions in Approval

U: Set Next Step
Updated Fields: Next Step Number

Updated Values: Use the MT: Same contract, higher Step Number, not Not Needed, sorted ascending by Step Number search.

U: Set Concurrent Approvals
Updated Fields: Concurrent Approvals

Updated Values: Use the MT: Approval for same contract with same Step Number search.

U: Set Lowest Step Number
Updated Fields: Lowest Step Number

Updated Values: Use the LF: Contract ID matches, sorted by Step Number search.

U: Set Next Step

Updated Fields: Next Approvals

Updated Values: Use the MT: Same contract - Step Number matches Next Step Number and Status is not Not Needed search.

TB: Demo Data Update: Update Date Fields by One Month Each Month so Reports have Data

Purpose: This rule updates the Demo Data in the Demo Master to ensure Charts/Reports are continuously populated with data.

Runs: At selected time intervals; monthly, on the first of each month at 10 PM

Search Filter: Demo Records

Priority: 1

Action:

U: Update Demo Dates

Updated Fields: Contract End Date, Contract Start Date, Renewal Email Sent on, Renewal Notification Date

Updated Values: $contract_end_date + 1 MONTHS, $contract_start_date + 1 MONTHS, $renewal_email_sent_on + 1 MONTHS, $renewal_notification_date + 1 MONTHS

TB: Notify of upcoming expirations (disabled)

Purpose: This rule controls the email notifications for upcoming expirations of contracts

Runs: At selected time intervals; every 10 years at 4 AM

Search Filter: R: Renewal Notification date is tomorrow and renewal type is auto-renewing or staff to notify

Priority: 5

Action:

E: Email Contract Owner about Renewal Date

Sent To: User in the Internal Contract Owner field

Summary: Reminds the Contract Manager that the impending renewal date of a contract

TB: Daily Check for Start Date (disabled)

Purpose: This rule checks for contracts whose start date has arrived and changes the Status accordingly

Runs: At selected time intervals; every 2 days at 6 AM

Search Filter: R: Status is signed and Start Date is today or earlier

Priority: 6

I: Actions When Start Date Arrives

```
Set Status to Active
if (Asset Involvement='For One or More Assets') {
        Set Current Contract ID to this contract in all assets
}
if (Previous Contract ID!=NULL) {
        Set Status of Previous Contract to Renewed
}
```

TB: Daily Check for Expiration Date (disabled)

Purpose: This rule checks for contracts whose End Date has arrived and takes the appropriate actions.

Runs: At selected time intervals; every 2 days at 12 PM

Search Filter: R: Active, End date passed

Priority: 5

I: Set to Expired or Renewed

```
if (Renewal Contract ID!=NULL) {
        Set Status to Renewed
} else if (Renewal Type='Auto-Renewing' and Status='Active' and Contract Updates!~='Auto-Renewal Terminated') {
        Set Contract End Date based on auto-renew term
        Append Auto-Renewed to Contract Updates
        Email contract owner that contract was auto-renewed
} else {
        Set Status to Expired
}
```

Workflow

The Contracts table has the following default workflow:

Reports

The Contracts table contains the following default Charts/Reports:

Contract Types Table

The Contract Types table is a background table used to populate the Contract Type field of a contract record. Each Contract Type record holds a value displayed as a choice in the Contract Type field. It also determines the default approval workflow for the contract, as well as the default print template for auto-generation of draft contract documents.

Figure 34. Contract Type records keep track of the default workflow and associated print templates.

Use Case

Contract Types can be created and edited by admins and Contract Managers. The Contract Type, Contract Type ID, Has Print Template(s), Default Print Template ID, and Contract Type Default Workflow Title are pulled into the Contracts table as a *Link to selected fields* from the Contract Type table.

If the Has Print Template(s) field value is Yes, additional fields in the Contract record are visible: Print Template to Generate and Create and Attach (an action button). The Default Print Template ID field is used to determine the default value in the Print Template to Generate field. Selecting a Default Print Template Title in a Contract Type record creates a link to the print template and updates the Available for Contract Types field in the associated Print Template record.

The Default Workflow Title field is used to set the value for the linked field in a Contract that pulls in the Workflow Title from the Workflow table. Selecting a Default Workflow Title in the Contract Type record creates a link to the workflow.

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Figure 35. Sample Contract Type record.

You can view all associated print templates and workflows on the Print Templates and Workflows tab of a contract type record. From here you can use the related table action bar to Unlink a print template or workflow from the contract type record if necessary.

Figure 36. The Print Templates and Workflows tab of a contract type record.

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Automation

The Contract Types table has the following rules set up.

Create: All Create Actions

Purpose: This rule handles all actions when creating a record. When a user selects a Default Print Template value during a Contract Type record's creation, a linked record action runs which adds that Contract Type's ID to the Print Template field Add Contract Type ID. When a user selects a Default Workflow Title value during creation of a Contract Type record, a linked record action runs which adds the Contract Type's name to the Workflow field Contract Types.

Runs: When created by web or API.

Search Filter: None.

Priority: 1

Action:

I: All Create Actions

Edit: Edit actions by Web

Purpose: This rule handles edits by web. When a user selects a new value for Default Print Template and/or Default Workflow Title, a linked record action runs which adds the present Contract Type's ID to the Print Template field Add Contract ID and/or adds the present Contract Type's name to the Workflow field Contract Types, respectively.

Runs: When edited by web only.

Search Filter: None.

Priority: 2

Actions:

I: Edit Actions

Attachments Table

The Attachments table is used to hold contract attachments such as generated contracts, insurance certificates, performance bonds, inbound documents, and signed agreements. Each record in the table represents one attachment that is linked to a contract.

Each attachment contains information about the parent contract for reference, held on the Contract Info tab.

Use Case

Attachments can be created directly from the Attachments table, from a parent contract, or by inbound email. Attachments can have a Status of Active, Expired, Contract Inactive, or Superseded.

Creating Attachments from the Attachments Table

To create a new attachment directly, click New from the Attachments table action bar. You can select the parent contract on the Contract Info tab by using the lookup icon next to the Contract Title field.

Figure 37. Sample Attachment record.

DocuSign users also see the Merged File field and the Merge Signature Block action button. When the Merge Signature Block action button is pressed, a DocuSign signature page is appended to the file in the Attached File field and the merged file is put into the Merged File field. The action button uses an *attached file action* and a MS Word template signature page. The signature page is specially formatted to include DocuSign tags. A rule then converts the file in the Merged File field into a new Attachment record and then resets the Merged File field to empty.

Creating Attachments from a Parent Contract

Attachments and insurance certificates can be created directly from a particular contract on the Attachments tab of the contract record. To create an attachment or insurance certificate, click New on the appropriate related table action bar. The attachment is automatically linked to the parent contract.

Figure 38. Sample Attachments tab of a contract record.

Attachments can be created from a print template using the Create and Attach action button in the Contract (see CREATING CONTRACT ATTACHMENTS FROM DEFAULT PRINT TEMPLATES). They can also be created by an action that runs on files attached to inbound emails sent to the Contract table's inbound email address (see CREATING CONTRACTS AND ATTACHMENTS FROM INBOUND EMAILS).

Ownership

Attachment records are owned by their creator. Specifically, an Attachment record is owned by the user whose Login matches the Creator Login field.

Automation

The Attachment table has the following rules set up.

Create: All Create Actions

Purpose: This rule handles all create actions, such as setting the To Be eSigned field for DocuSign files, updating the linked Contract's DS Files to Sign field, and setting the type and title for signed contracts.

Runs: Upon creation by Web or API

Search Filter: None

Priority: 1

Action:

I: All Create Actions

```
if (Title~='with signature block') {
        Set To be Signed to Yes
        Set Contract Update DS Files Flag to Yes
}
if (DocuSign Envelope ID!=NULL) {
        Set Attachment Type and Title to Signed DocuSign Contract
}
if (To Be eSigned='Yes') {
        Set Contract Update DS Files Flag to Yes
}
if (Supercede Old Versions='Yes') {
        Set Previous Attachment - Same Type and Contract, Different ID
        Set Previous Attachment to Superseded
}
```

Edit: Convert Merged File

Purpose: This rule detects when an attached file has been merged with a signature page, then converts into a new Attachment and sets the Merged File and To Be eSigned fields.

Runs: When an attachment is edited via Web or API

Search Filter: The Merged File field is not empty

Priority: 4

Action:

C: Convert to new Attachment

Conversion: Attachment

U: Blank out merged file field and set to be signed to no

Updated Field: Merged File

Updated Value: Delete

Updated Field: To Be eSigned

Updated Value: No

Edit: Handle To Be Signed changes and Superseding

Purpose: This rule checks to see if the To Be eSigned field was changed, and updates the DS Files to Sign field in the linked contract. It then checks if the Status changed to Superseded and if so, sets the To Be eSigned and Include in Approval Packet fields to No.

Runs: When an attachment is edited via Web or API

Search Filter: None

Priority: 2

Action:

I: Edit actions for To Be Signed and others

```
if (To Be eSigned changed from: any value to: any value during record's last modification) {
        Set Contract Update DS Files Flag to Yes
}
if (Status changed from: any value to: 'Superseded' during record's last modification) {
        Set include in approval packet field to No
        Set To be Signed to no
}
```

TB: Daily - If Contract Status is not inactive and Status is Contract Inactive, reset Status of Attachment (disabled)

Purpose: This rule checks the Expiration Date of attachments, updates the Status of the attachment, and notifies the Internal Contract Owner of any expired attachments.

Runs: Once every 2 days at 4 am

Search Filter: R: Status is Contract Inactive and Contract is in progress or Active

Priority: 14

Action:

I: Change Status if Contract Status changes

```
if (Expiration Date>=1 minute old) {
        Set Status to Expired
        Email Internal Contract Owner of Expired Attachment
} else {
        Set Status to Active
}
```

TB: Handle Attachment Expiration (disabled)

Purpose: This rule checks to see if a valid attachment is expiring today, and updates the Status of the certificate and notifies the Contract Manager Team depending on the Contract's Status.

Runs: Once every 2 days at 1 am

Search Filter: Active Attachments Expiring Today.

Priority: 1

Action:

I: Handle Attachments Expiring Today

```
if (Contract Status='Active') {
        Set Status to Expired
        Email Internal Contract Owner of Expired Attachment
} else {
        Set Status to Contract Inactive
}
```

TB: Notify Internal Contract Owner 30 days in advance of expiration (disabled)

Purpose: This rule checks to see if a valid attachment is expiring in 30 days, and notifies the Internal Contract Owner via email.

Runs: Daily at 2 am

Search Filter: R: Expiration Date is greater than or equals 30 days in the future and less than 31 days in the future.

Priority: 1

Action:

I: Handle 30 Day Expiration Notices

```
if (Contract Status='Active') {
        Email Internal Contract Owner of Upcoming Attachment Expiration
} else {
        Set Status to Contract Inactive
}
```

Attachment Types Table

The Attachment Types table is a background table that holds a record for each value to be displayed in the Attachment Type field within the Attachment record. It also defines any special fields to be displayed for this attachment type within the Attachment record.

Use Case

Attachment Types can be created and edited by admins and Contract Managers. The Attachment Type and Fields to Show fields are pulled into the Attachments table as a link to selected fields from another table. The values in Fields to Show are used by visibility dependency options to control visibility of certain fields in the Attachment records depending on the Attachment Type selected.

The Sort Order field is used to determine the order of the drop-down list displayed in the Attachment Type field within Attachment records.

Figure 39. Attachment types control visibility of other fields in Attachment records.

Ownership

Attachment Type records are owned by their creator. Specifically, an attachment type record is owned by the user whose Login matches the Creator Login field.

Print Templates Table

The Print Templates table is a background table that holds a record for each print template used by the Contracts table or other system tables. It also keeps track of the Version Number of the attached print template document, and defines which Contract Types can use the print template in the Available for Contract Types field.

Use Case

Print Templates can be created and edited by admins and Contract Managers. The ID, Title, Template File, and Version Number fields are pulled into the Contracts table as a link to selected fields from another table. These are filtered to print templates whose Available for Contract Types field contains the Contract Type selected in the current Contract record. If multiple print templates are available for a Contract Type, the default value for the Print Template to Generate in the Contract is matched to the Default Print Template Title and Print Template File fields of the selected Contract Type.

Figure 40. Print Templates are used to generate contracts.

Ownership

Print Template records are owned by their creator. Specifically, a Print Template record is owned by the user whose Login matches the Creator Login field.

Automation

Edit: Edit actions by API or Web – add contract type

Purpose: This rule monitors changes to the value of the Add Contract ID field and automatically updates the list of available print templates for each contract type. Users may update the Add Contract ID field via a linked record action (see the Automation section for the Contract Types Table). When the Add Contract ID field changes, this rule adds the Contract Type matched to that ID to the Print Template field Available for Contract Types.

Runs: Upon edit by Web or API

Search Filter: R: Add Contract Type ID just changed (Last Modification)

Priority: 10

Action:

U: Append Contract Type to Available Contract Types

Updated Field: Available for Contract Types

Updated Value: Use the MT: Contract Type ID matches Print Template Add Contract Type ID search*.*

Approvals Table

The Approvals table is used to hold all of the approvals processed by the system. Each record in the table is an individual approval or rejection linked to a parent Contract record. Approvals may also be linked to the Documents or Change Requests tables.

Use Case for Contracts

Creation of Approvals

The process begins when the Create Approvals button is clicked in the contract record. Contract approval records are created from Approval Templates using a conversion action or manually on an ad hoc basis. For information on starting the approval process for a contract, refer to the HANDLING APPROVALS section.

Approval Records

Each approval record stores the parent Contract ID, Approval Team, and Approver, the user who submitted the approval. The Date Approved/Rejected field captures and displays the timestamp of the approval, shown on the History tab.

Figure 41. Sample Approval record.

Notes about the approval or rejection are entered into the Approval Notes field.
When the record is saved, the notes are appended to the Approval Running Notes section and are visible from *any* approval linked to that Contract. Additionally, the notes are appended to the Approval Notes field in the parent contract record, located on the Approvals tab.

All Notes by Approvers	
Approval Notes	[Agiloft System Mar 31 2015 10:56] This contract needs significant revision.
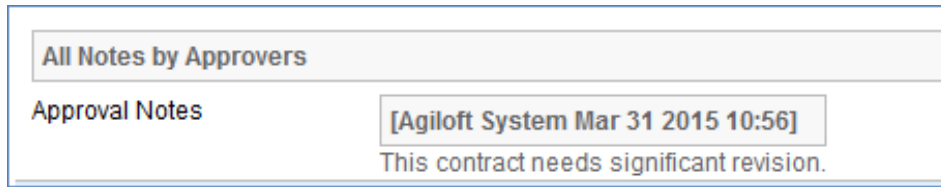
Figure 42. Notes from all approvers are stored in the Approval Notes field.

Only Approvers and members of the Approval Team can update approval records. Users updating the Status to Permanently Rejected or Requires Change must enter Approval Notes.

Use Case for Documents

To begin the approval process for documents, select Yes for Requires Approval on the Progress tab of a Document record. Select one or more Reviewer(s) who will be assigned to review and approve the document. Click Submit for Approval to generate the approval records.

	Edit	ID ↓	Approval Title	Approver	Approval Team	Status
☐	🖊	605	Document Approval	Marva Lazinski	Document Reviewers Team	Pending Approval
☐	🖊	604	Document Approval	Sarah Connor	Document Reviewers Team	Requires Change
☐	🖊	603	Document Approval	Ralph Knowles	Document Reviewers Team	Approved

Figure 43. Choose the document reviewers before generating approvals.

All Document approvals are created with an Approval Status of Pending Approval. Document approvals are parallel, i.e. all document-related approval records are created and a Step Number of "1" through conversion. Notes added to document approvals are appended to the Approval Notes field in the parent document.

For more information on approvals for documents, see the DOCUMENTS TABLE section on Processing of Records.

Ownership

Approval records and Approval Template records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

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Automation for Approvals

The Approvals table has the following rules set up.

Create: All Contract Approval Create Actions (web, API)

Purpose: This handles the creation and assignment actions for all newly created contract approval records.

Runs: When created by web or API.

Search Filter: Contract ID is not empty

Priority: 1

Actions:

I: Contract Create and Assign Actions

```
Set Related To to Contracts
Set Approval Packet Files
Set Next Step
Set Concurrent Approvals
Set Lowest Step Number
Update Next Approvals in Approval Records
if (Assign Approval Based On='Person from Contract') {
        Set Approver from Variable
}
```

I: Set Approval Team if empty

```
if (Approval Team=NULL or Assign Approval Based On='Person from Contract') {
        if (Approver!=NULL) {
                Set Approval Team to Primary Team of Approver
        } else {
                Set Approval Team to the Contract Assigned Team
        }
}
```

Create: Document Approval Creation Actions (web, API)

Purpose: This handles the creation, assignment, and notification actions for all newly created document approval records.

Runs: When created by web or API

Search filter: Document ID is not empty

Priority: 1

Actions:

I: Create Actions for Document Approvals

```
Set Related To to Documents
Set Approval Team to Doc Reviewers Team and set Approval Status to Pending Appro
Email Approver for document approval of Pending Approval
```

Create: Notify if Needed for Contract Approval (web, API)

Purpose: If the approval is created in a status of Pending Approval, notify the Approver or Approval Team or auto-approve if appropriate. This would apply to an ad hoc approval when it is created.

Runs: When created by web or API

Priority: 3

Search Filter: Status is Pending Approval and Contract ID is not empty (i.e., it is for a contract)

I: Handle Approvals created in Pending Approval Status

```
if (Auto-Approve!='Yes') {
        if (Approver!=NULL) {
                Email the Contract Approver for Pending Approval
        } else {
                Email Contract Approval Team of Pending Approval
        }
} else {
        Email Approval Team auto-approved notification for contract
        Increment Number of Approvals Completed in Contract
        if (Number of Open Concurrent Approvals=0) {
                Set Next Approvals to Pending Approval Status
        }
}
```

Edit: All Edit Actions for Document Approval Updates (web and API)

Purpose: This handles all document-related approvals and rejections, as well as approval notes updates.

Runs: When edited by web or API

Search filter: Related to Documents

Priority: 4

I: All Document Approval Edit Actions

```
if (Approval Notes changed from: any value to: any value last user's modification) {
        Copy approval notes to Document
}
if (Status changed from: any value to: 'Requires Change' during record's last modification) {
        Notify other approvers of required change
        Email document manager that doc requires changes
} else if (Status changed from: any value to: 'Permanently Rejected' last user's modification) {
        Notify other approvers of permanent rejection for document
        Set Status of document to Canceled
} else if (Status changed from: 'Requires Change' to: 'Pending Approval' during record's last modification) {
        Email Document Approver that document requires reapproval
        Blank approval notes
        Blank approval date and approver
} else if (Status changed from: any value to: 'Approved' during record's last modification) {
        Update Number of Approvals Needed in Document
}
```

Edit: All Contract Approval Edit Actions

Purpose: Handles updates to approvals for a contract. Launches the next approval in the workflow when an approval is completed.

Runs: When edited by web or API

Priority: 5

Saved Search: Related to Contracts

I: All Contract Approval Edit Actions

```
if (Approval Notes changed from: any value to: any value last user's modification) {
        Copy approval notes to contract
}
if (Status changed from: any value to: 'Pending Approval' during record's last modification) {
        Increment Approval Round by 1
        if (Auto-Approve='Yes') {
                Set Approval Status to Approved
                Email Approval Team auto-approved notification for contract
        } else {
                if (Approver ID!=NULL) {
                        Email the Contract Approver for Pending Approval
                } else {
                        Email Contract Approval Team of Pending Approval
                }
        }
} else if (Status changed from: any value to: 'Permanently Rejected' during record's last modification) {
        Email Contract Manager of rejection
        Set Queued and Pending Approval Approvals to Not Needed
        Set Contract Status to Canceled
        Append Rejected to Contract Updates in Contract
} else if (Status changed from: 'Pending Approval' to: 'Not Needed' during record's last modification) {
        if (Approver!=NULL) {
                Email Approver that pending approval is no longer needed
        } else {
                Email Approval Team that pending approval is no longer needed
        }
} else if (Status changed from: any value to: 'Requires Change' during record's last modification) {
        Email Contract Owner that an approver has requested a change
        Set related approvals that are not Queued or Not Needed to Queued
        Set Contract Status to Pending Contract Manager
} else if (Status changed from: 'Pending Approval' to: 'Queued' during record's last modification) {
        if (Approver!=NULL) {
                Email Approver that the approval has been Queued
        } else {
                Email Approval Team that approval has been queued
        }
} else if (Status changed from: any value to: 'Approved' during record's last modification) {
        Increment Number of Approvals Completed in Contract
        if (Number of Open Concurrent Approvals=0) {
                Set Next Approvals to Pending Approval Status
        }
        if (Approver!='$_1888_full_name') {
                Set Approver to Last Updated
        }
}
```

Edit: Approval by Email (web)

Purpose: Checks for updates by email that change the Approved by Email field from No to Yes, and changes the Status to Approved accordingly

Runs: On edit by web

Priority: 6

Saved Search: R: Approved by Email changed to Yes and Status is Pending Approval

> ### U: Set Approved by Email to No

> ### U: Set Approval Status to Approved

Approval Templates Table
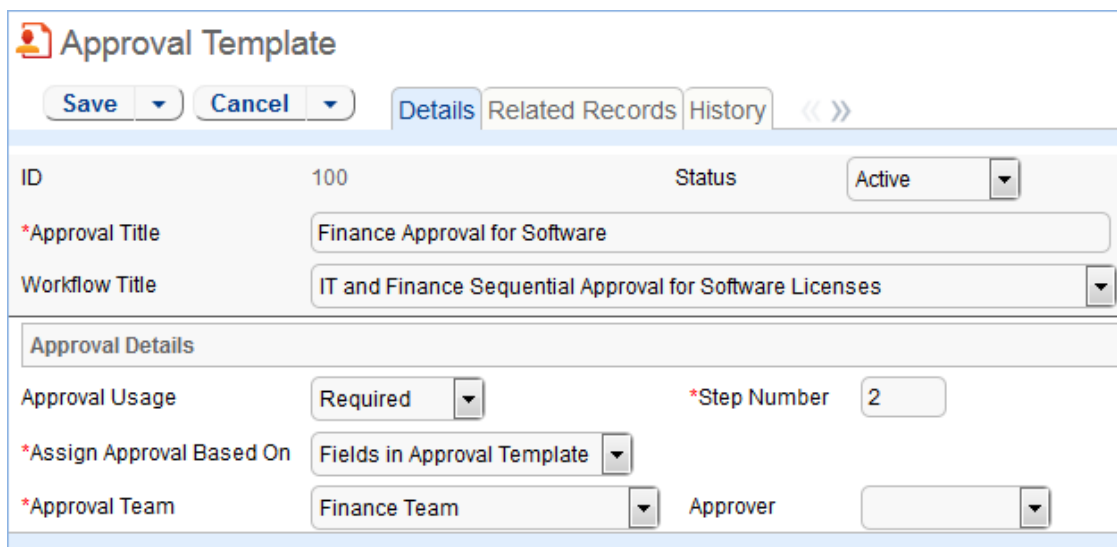
The Approval Templates table is a background table that supports the Workflow table. The Approval Templates table holds a record for each Approval Template used by a Workflow to generate a contract's Approval records.

Each approval template can only be used by a single Workflow, i.e., there is a one-to-many relationship between Workflows and Approval Templates.

Use Case

Approval Templates can be created by users in the Admin and Contract Manager groups. New approval template records are normally added from within a Workflow record. Creating an Approval Template from the Workflow table populates the link to the workflow. If an approval template is created directly from the Approval Template table, a Workflow Title can be manually selected.

Each template contains information about which Workflow uses the approval template, whether the approval is Required or Conditional, and how the approval is assigned. The required fields are Approval Title, Assign Approval Based On, and Step Number.

Figure 44. Sample approval template record form.

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The Related Records tab displays all other approval templates used in the same workflow.

All Templates for this Workflow

All Templates for this Workflow
Status: 3 record(s) found, 1 pages. Click here to re-count records.

	Edit	ID	Step Number ↑	Approval Title	Approval Team	Assign To	Approval Usage
☐	📝	7	2	Legal Team Approval	Legal Team		Required
☐	📝	9	3	Compliance Team Approval	Compliance Team		Required
☐	📝	6	4	Risk Team Approval	Risk Team		Required

Figure 45. The Related Records tab shows all other templates in the same workflow.

The Step Number and title for the approval are used when converting the template to an Approval record.

Required vs. Conditional Approvals

In the Approval Usage field, the user sets whether the approval is Required or Conditional. Both required and conditional approvals are automatically generated when the Create Approvals button is clicked in the contract record.

When Conditional is selected, the Condition field will appear. The user can then input a formula that is evaluated when approvals are generated. This formula can contain any number of conditions that can be linked together by operators such as "or", "and", "contains", etc. Conditional approvals are only generated if the condition is met (typically the Condition is a search criterion based on some field value(s) in the Contract).

Assigning Approvals

Approvals can be assigned to teams or users based on fields in the Approval Template or other variable fields from the parent contract such as Contract Owner, Requester Manager, Contract Department Head, etc.

If "Fields in Approval Template" is selected in the Assign Approval Based On field, the Approval Team and Approver fields are visible. The Approver field is filtered to members of the selected Approval Team.

If instead "Person from Contract" is selected, the Assign To field appears. The drop-down selection in this field shows a list of user fields from the Contract record, such as Contract Owner, Contract Requester, and Requester Manager.

Admin Note: The selections in the Assign To field are linked from the Replacement Variables table. Refer to the REPLACEMENT VARIABLES TABLE section for more information.

Figure 46. Approvals can be automatically assigned based on fields in the contract record.

Sequence of Approvals

The sequence of approvals depends on the Step Numbers. Approvals are generated and ordered based on the Step Number order, and are triggered to Pending Approval from the lowest to the highest Step Number. To set up parallel Approvals, give the same Step Number to each Approval Template in a parallel step. All concurrent Approvals (that is, Approvals with the same step number) must be approved in order to trigger the next step.

The automation that controls the triggering and ordering of approvals is managed from the Approval record, not the Approval Template. Fields in the approval record are used to determine if there are concurrent approvals and to define the Lowest Step Number (which may not be 1, if the first step is a conditional approval marked as Not Needed).

Automatic Approvals

If the Approval Template is really a notification, rather than an approval, set the Auto Approve? field to Yes. When the template is converted into an Approval record, a rule running on the Approval table automatically sets the approval's Status to Approved and sends a custom notification message in place of the assignment notification.

Automation

The Approval Templates table has the following rules set up.

Create/Edit: Blank out fields depending on Assign Approval Based On (web, API)

Purpose: Clear out the non-applicable fields depending on the value of Assign Approval Based On.

Runs: When created or edited by web or API

Search Filter: None

Priority: 1

I: Blank out fields based on Assign Approval Based On

```
if (Assign Approval Based On='Fields in Approval Template') {
    Blank out Assign To
} else if (Assign Approval Based On='Person from Contract') {
    Blank out Approval Team and Approver
}
```

Edit: All Edit Actions

Purpose: This rule handles the creation of an approval record from an approval template when the relevant workflow is selected.

Runs: When created or edited by web or API.

Search Filter: None

Priority: 1

Actions:

I: Handle Flags to Generate or Check Approvals

```
if (Trigger Approval Creation='Yes') {
    if (Generated for Contract IDs!~=='$latest_contract_id' and Latest Contract ID!=NULL and (Approval Usage='Required' or Approval
    Usage='Conditional' and Condition='TRUE')) {
        Convert to Approval
        Update Generated for Contract IDs
    }
    Set Trigger Approval Creation to No
} else if (Flag to Clone Template='Yes') {
    Convert to Approval Template
    Set Flag to Clone Template to No
} else if (Flag to Recheck Approval='Yes') {
    Set Flag to Recheck Approval to No
    if (Generated for Contract IDs!~=='$latest_contract_id' and Condition='TRUE') {
        Convert to Approval
        Update Generated for Contract IDs
    } else if (Generated for Contract IDs~=='$latest_contract_id' and Condition='FALSE') {
        Conditional Approval is no longer needed
        Set unnecessary Approval to Not Needed
    } else if (Generated for Contract IDs~=='$latest_contract_id' and Condition='True') {
        Set Status of Not Needed approval to Queued
    }
}
```

Workflows Table

The Workflows table holds predefined workflows for the contract approval process. The nature of the workflow is defined by the approval templates, and whether there is more than one for a given step number. The approval process can include a combination of parallel and sequential approval steps.

Use Case

Workflow records may be created by members of the Admin and Contract Manager groups.

To create a new Workflow, click New from the Workflow table action bar.

By default, the Used in field is set to Contracts, which also makes the Contract Types field visible. Select the Contract Types for which the workflow is available.

The next step is to add approval templates to the workflow by clicking New in the action bar of the Approval Templates related table. For more information on how to design the templates to get a mixture of sequential and parallel approvals, see the SEQUENCE OF APPROVALS section.

Figure 47. Sample Workflow record.

Required fields are marked by a red asterisk. These include the Status, Workflow Title, and which table the workflow is Used In. If the choice of table in the Used In field is Contracts, additional options allow the user to specify which Contract Types can use this workflow.

When the workflow is selected for use in an approval process, the system can generate required Approval forms based on the specified approval templates. New required approval templates are created directly from within the related table by clicking the New button.

Managing and Reusing Workflows

Workflows can be modified even if there are outstanding contracts using them. Since the approvals are generated up front when the contract moves to Pending Approval, later modifications to the workflow and its templates will only have an impact if there are conditional approvals which are rechecked later in the process.

A workflow can be cloned by using an action button. Clicking Clone Workflow will copy the workflow, and make a copy of each of its approval templates. The cloned Approval Templates will be automatically linked to the newly cloned Workflow record.

Workflow Statuses

The workflow Status is either Active or Inactive.

An Active workflow appears in the Workflow Title drop-down menu from a Contract record. Workflows with a Status of Inactive are no longer available for use in the approval process; inactive workflows do not appear in the drop-down menu as a possible approval process selection. Admin group members can change a workflow from Active to Inactive if needed.

Ownership

Workflow records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Automation

Create: All Create Actions (web, API)

Purpose: This rule handles creation actions for Workflows.

Runs: When created by web or API.

Search Filter: None.

Priority: 1

Actions:

I: All Create Actions

```
if (Source Workflow ID!=NULL) {
            Map ID into Source Workflow Approval Templates
            Set Cloned Workflow Title
}
```

Contract Tasks Table

The Contract Tasks table holds tasks for contracts.

Use Case

Contract Tasks can be created from a related table in a Contract record. If a Contract Task is created from a Contract, the link to the Contract is populated; otherwise a Contract should be selected.

Contract Tasks are created in the default Status of Planned. On creation, the Assigned Person is notified of the planned task, unless the assignee is the task's creator. If no Assigned Person is chosen, the Assigned Team is notified of the planned task and asked to assign someone.

When the Advance Notification Date arrives, the Status changes to Pending. Any open Contract Tasks (those in a Status of Pending or Planned) for a canceled contract will be updated to a Status of Canceled.

Figure 48. Sample Contract Task record.

Ownership

Workflow records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Automation

Create: All Create Validations

Purpose: This handles validations for Contract Tasks upon creation.

Runs: When created by web.

Search filter: None

Priority: 1

I: All Create Validations

```
if (Contract Status='Canceled') {
        Cannot add task to canceled contract
}
if (Date Due<this day) {
        warn that due date is in the past
}
if (Advance Notification Date>'$date_due') {
        Cannot set notification date after date due
}
if (Status='Planned' and Advance Notification Date=NULL) {
        warn that planned should have a notification date
}
```

Create: All Create Actions

Purpose: This handles actions for Contract Tasks when being created.

Runs: When created by web, email, or API

Search filter: None

Priority: 2

I: All Create Actions

```
if (Assigned Person!='$_1880_full_name' and (Status='Pending' or Advance Notification Date>=1 minute old)) {
        if (Assigned Person!=NULL) {
                Email Assignee of new Contract Task assignment
        } else {
                Email Assigned Team that Contract Task has been created
        }
}
if (Status='Planned' and Advance Notification Date>=1 minute old) {
        Set Status to Pending
}
```

TB: Daily Check for Advance Notification Date (disabled)

Purpose: This sets the Status to Pending on the Advance Notification Date, and sends a reminder email.

Runs: Daily

Search filter: (Status=Planned or Pending) and Advance Notification Date is today.

Priority: 10

   U: Set Status to Pending

I: All Reminder Actions

```
if (Assigned Person!=NULL) {
                Email assignee reminder
} else {
                Email Assigned Team reminder
}
Set Date of Last Reminder
Set Date of Next Reminder
```

U: Set Date of Last Reminder

Please enter new values for these fields

Date of Last Reminder | NOW() | Formula Help

Treat the above as ◯ Standard text   ● A formula

U: Set Date of Next Reminder

Please enter new values for these fields

Date of Next Reminder | NOW() + $days_to_send_reminder days | Formula Help

Treat the above as ◯ Standard text   ● A formula

TB: Daily Check for Reminders (disabled)

Purpose: This sends reminder emails for open Contract Tasks after the Advance Notification Date, based on Days to Send Reminder.

Runs: Daily

Search filter: (Status=Planned or Pending) and Date of Next Reminder is today.

Priority: 20

I: All Reminder Actions

```
if (Assigned Person!=NULL) {
                Email assignee reminder
} else {
                Email Assigned Team reminder
}
Set Date of Last Reminder
Set Date of Next Reminder
```

U: Set Date of Last Reminder

Please enter new values for these fields

Date of Last Reminder | NOW() | Formula Help

Treat the above as ○ Standard text
● A formula

U: Set Date of Next Reminder

Please enter new values for these fields

Date of Next Reminder | NOW() + $days_to_send_reminder days | Formula Help

Treat the above as ○ Standard text
● A formula

PROJECT MANAGEMENT TABLES

Project Table

The Project table holds records for project management activities. By default, the Project Category is set to Internal. Changing the Project Category to Client Related optimizes a project for companies providing consulting services to their clients, and allows them to manage billable and unbillable hours, work authorizations, and overall project status.

Use Case

A Project can be created only with a Status of Work in Progress, Awaiting Customer Feedback, and Pending.

Figure 49. Sample Project record.

The user who creates the project record is automatically set as the Project Manager, and will receive email notifications pertaining to the project's status, such as when a task is completed. Additional users can be notified of changes to the project by using the lookup icon to enter users into the Project CCs field.

Project records are divided into two broad categories, Internal and Client-Related, set by the Project Category field. These categories are further divided by choosing a Project Type, a filtered list based on the category. Project Types are pulled in from the Project Type table and used to manage a sequence of required and/or optional tasks, created from Task Templates. For more information, see the PROJECT TYPES TABLE section.

To generate tasks, a project must be in a state (Status) of Work in Progress. Then, Save the record to trigger a rule which generates the tasks from the appropriate template. Dependent tasks are created when the preceding task in the sequence is completed. Tasks can be managed and viewed on the Tasks tab of the Project record. From here, additional ad-hoc tasks can be created using the Create an Ad Hoc

Task button. Optional tasks from the project's template can be created manually by selecting tasks and clicking the Create Task(s) Manually action button.

Additional fields are visible for Client-Related projects. These fields hold information about the company, customer contract, contact information, and authorized hours.

Time spent on projects is tracked on the Time / Billing tab. It includes a small form to enter time spent and a related table of time entries for the project. Time entries can be searched for in the related table and linked to the project manually.

Ownership

Records in this table are owned by the user whose Full Name matches the Project Manager field.

Automation

Create: All Project creation actions

Purpose: This handles notifications for new project assignments.

Runs: When created by web, email or API

Search filter: None

Priority: 1

Actions:

I: All create actions

```
if (Project Manager!=NULL and Project Manager!='$created_by') {
        Email Project Manager that new Project has been assigned to him/her
}
if (Project CCs!=NULL) {
        Email Project CCs about new project
}
if (Status='Work In Progress' and Default Tasks!=NULL) {
        Trigger Default Tasks
}
```

Edit by Web/API: Handle number of open tasks changes

Purpose: Handles status changes necessitated by completion of Tasks attached to the Project.

Runs: Edit by Web or API

Search Filter: R: Has Tasks and the number of open tasks changed

Priority: 1

Actions:

I: Handle completing or adding tasks

```
if (Number of Open Tasks=0 and Status='Work In Progress') {
    Set Status to "Tasks Completed"
    Email Project Manager and Project CCs that project tasks are completed
} else if (Number of Open Tasks changed from: =0 to: > 0 during record's last modification and Status='Tasks Completed') {
    Set Status to Work in Progress
}
```

Edit by Web: All edit actions

Purpose: Validates against completion of Project with Tasks still open. Triggers new Tasks added on edit, and cancels Tasks on cancellation of project.

Runs: Edit by Web

Search Filter: None

Priority: 2

Actions:

I: All edit validation actions

```
if (Status changed from: any value to: any of 'Completed','Tasks Completed' last user's modification and Number of Open Tasks>=1) {
    can't complete with open tasks
}
```

I: All edit actions by web

```
if (Default Tasks!=NULL and Status changed from: any value to: 'Work In Progress' last user's modification) {
    Trigger Default Tasks
} else if (Status changed from: any value to: 'Cancelled' last user's modification) {
    Cancel Tasks
    Email Project CCs about cancelled project
}
```

TB Demo Data Update: Update date fields by one month each month so reports have data

Purpose: Keeps template knowledgebase up to date. Can be safely deleted.

Runs: Monthly

Search Filter: Demo Records

Priority: 1

Actions:

U: Update Demo Dates

Fields Changed: Date Contract Approved, Next Milestone Date, Target Completion Date

Values Changed to: $date_contract_approved + 1 months, $next_milestone_date + 1 months, $target_completion_date + 1 months

Workflow

The Projects table has the following default workflow:
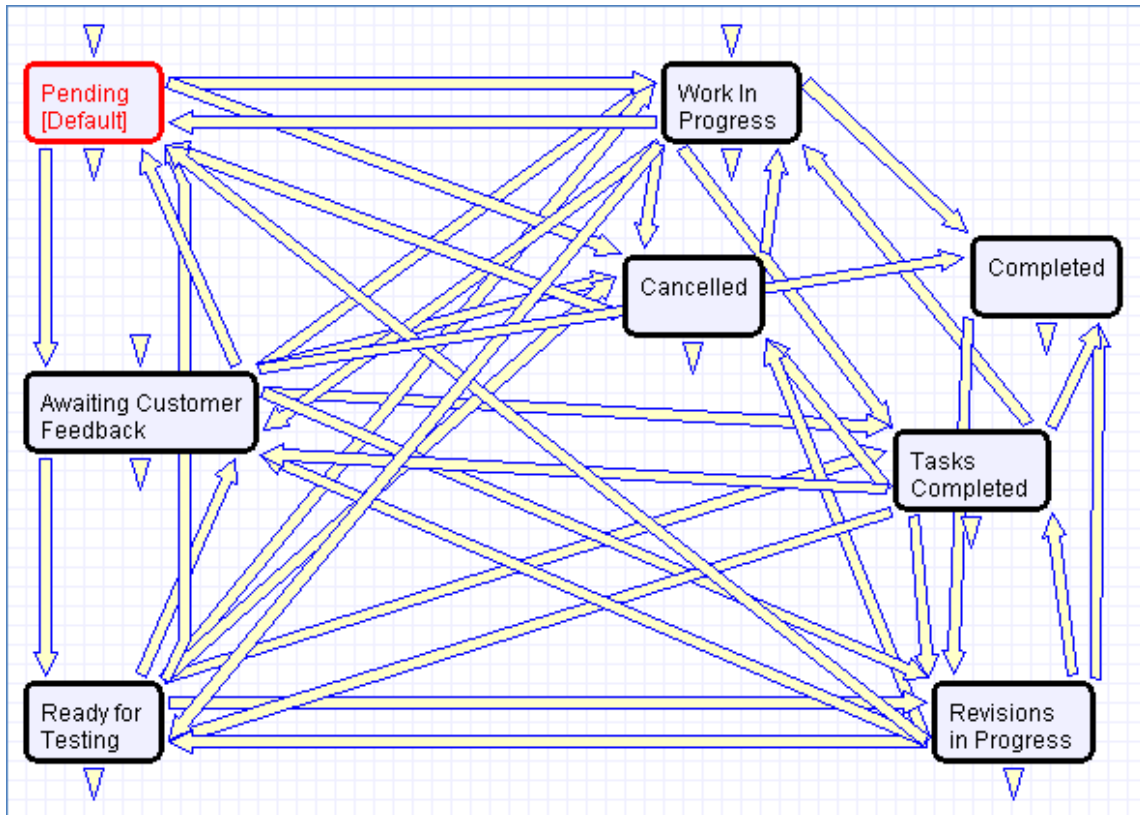
Reports

The Projects table includes the following default Charts / Reports:

Project Types Table

The Project Types table is a background table that holds choices for the Project Type field referenced by the Projects table. The use of this table instead of a choice list allows the creation of new Project Type values by Project Managers and other users, without requiring Admin group privileges to modify choice lists.

A Project Type record can also be used as a template for task generation. The Task Templates tab displays a related table of all task templates for the specific project type. Task templates are linked to project types by a match in the Project Type field in both records.

Figure 50. Default tab of a Project Type record.
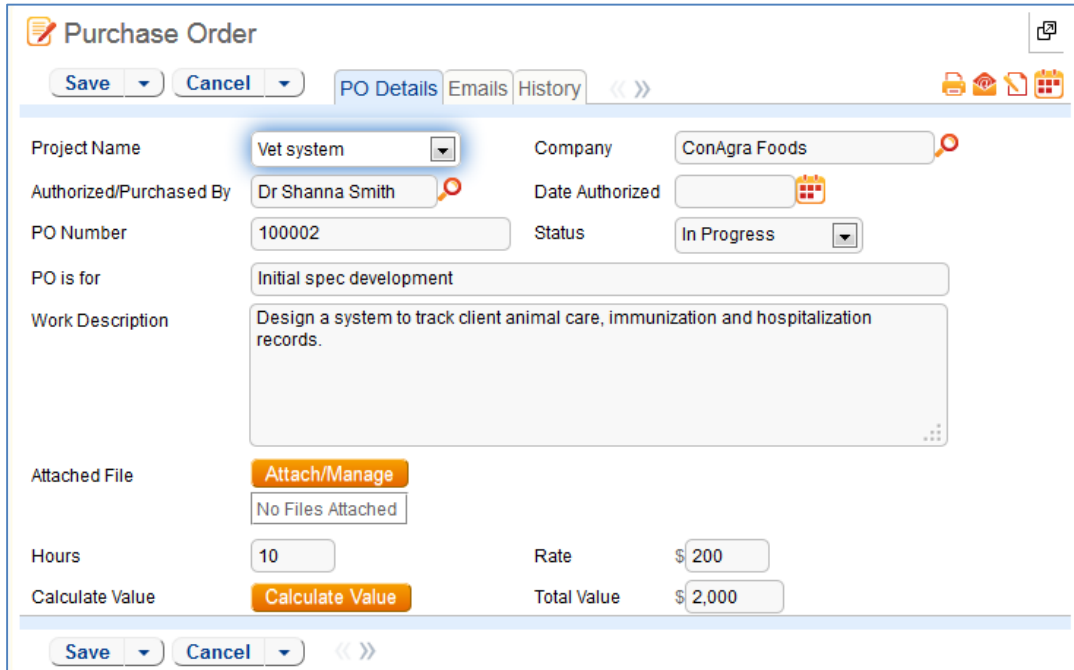
Purchase Orders (PO) Table

The Purchase Orders table tracks authorized billable hours for a project. It appears as a related table within a Project table record under the Time Authorizations heading on the Time / Billing tab.

Use Case

Purchase Order records are creatable manually via the web form, from within Project records in the related table, or via mass import. Only members of the Professional Services, Sales and Admin groups may create or import records. PO records are creatable in any workflow (Status) state.

Only members of the Project Manager, Marketing, Sales, Sales Manager and Admin groups may create or edit records, but Support Staff may view all PO records.

Figure 51. Sample Purchase Order record.

Ownership

Purchase Orders records are owned by the user who creates them. Specifically, a record is owned by the user whose Login matches the Creator Login field.
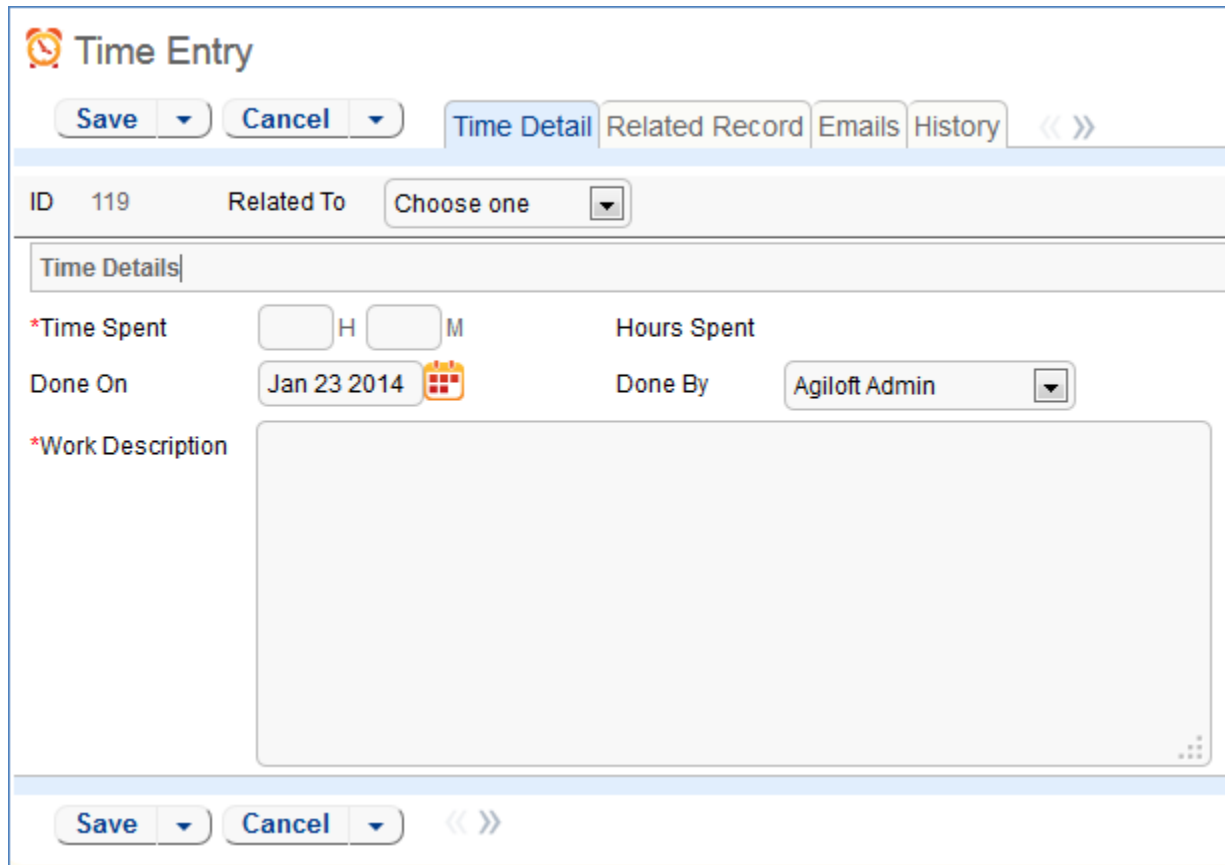
Workflow

The Purchase Orders table has the following default workflow:

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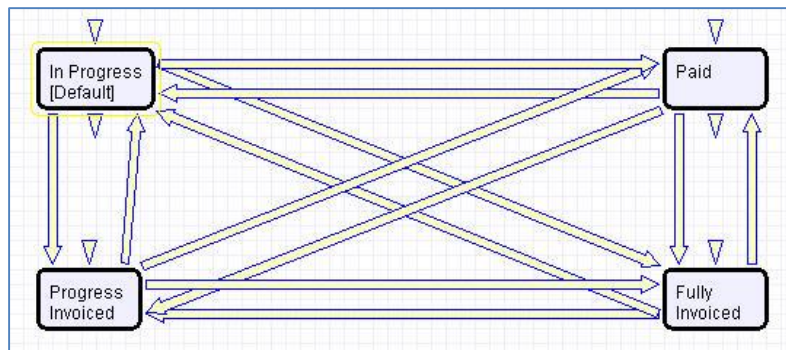
Time Entries Table

This table tracks time entries made by staff users. It can be related to records in any other table and users are allowed to create time entries from any other table. It is related to the Support Case, Helpdesk Case, Change Request, Project, Repair Request, Repair Task, Employee Time, and Task tables by default.

Figure 52. Sample Time Entry record.

Use Case

Time entry records are used to track employee labor for billing or accounting reporting. Time entries are generally linked to Projects, Tasks, Support Cases, or Helpdesk cases, but can be integrated in any table where a way of tracking employee time is useful.

Time Entries can be created directly in the Time Entry table or from linked fields in other tables with rule automation to automatically convert the entries into a separate Time Entry record. The automatic conversion from simple fields is available from the Support Case, Helpdesk Case, Project, Task, and Change Request tables. We usually recommend creating time entries from another table, as default values for selected fields may be included in the record conversion mapping. This ensures greater accuracy and uniformity of data.

If the Related To field of a time entry is left blank, a rule will update the field upon saving with the first non-empty field from the following list: Change Request ID, Helpdesk Case ID, Project ID, Support Case ID or Task ID. If all of the fields are blank (no related table is indicated), the Related To value is set to Employee Time.

Admins and members of the Marketing, Project Manager, and Sales groups can view and edit their own time entries. Marketing, Project Manager, Support Manager, Support Staff, and Sales groups may view, but not edit, all time entry records. No other groups have access to the table by default.

Ownership

Time Entry records are owned by the user who creates the record. Specifically, they are owned by user whose Login matches the Creator Login field.

Automation

Create: Set Related to Field when empty

Purpose: This handles calculations of totals on the creation of a product quoted.

Runs: When created by web, email or API

Search filter: R: Related To is empty

Priority: 1

Actions:

I: Set Related to based on content

```
if (CR ID!=NULL) {
        Set Related to Change Request
} else if (Helpdesk Case ID!=NULL) {
        Set Related to Helpdesk Case
} else if (Project ID!=NULL) {
        Set Related to Project
} else if (Support Case ID!=NULL) {
        Set Related to Support Case
} else if (Task ID!=NULL) {
        Set Related to Task
} else {
        Set Related to Employee Time
}
```

TB Demo Date Update: Update date fields by one month each month so reports have data

Purpose: Keeps template knowledgebase up to date. Can be safely deleted.

Runs: Monthly

Search Filter: Demo Records

Priority: 1

Actions:

U: Update Demo Dates

Fields Changed: Invoiced On, Done On

Values Changed to: $done_on + 1 months, $invoiced_on + 1 months

Reports

The Time Entries table contains the following default Charts / Reports:

Charts/Reports

Status: 9 record(s) found, 1 pages. Click here to re-count records.
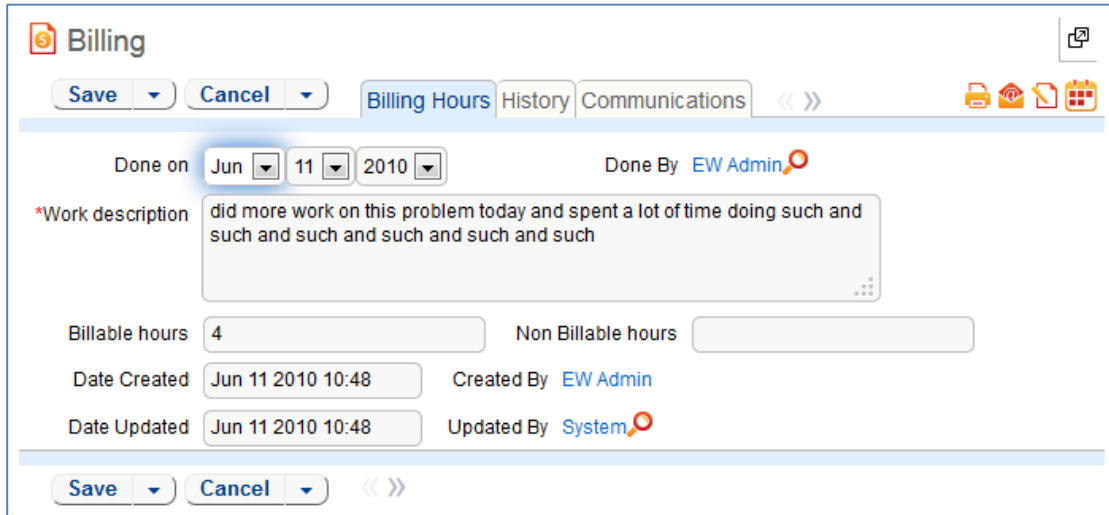
New | Copy | Delete   Views

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format
☐			Billable hours by assignee in the last month		Yes	Jul 02 2013 08:01	Graphical chart
☐			Hours records by project		Yes		Graphical chart
☐			Last month's Invoicing summary		Yes	Jul 02 2013 08:01	Graphical chart
☐			Time records by employee	not customer	Yes	Jul 02 2013 08:03	Graphical chart, HTML
☐			Total Billable Hours by Assignee		Yes	Jul 02 2013 08:02	Graphical chart
☐			Total Hours by assignee		Yes	Jul 02 2013 08:03	Graphical chart
☐			Total Hours by project		Yes	Jul 02 2013 08:04	Graphical chart
☐			Total Non-billable Hours by Assignee		Yes		Graphical chart
☐			Uninvoiced Billable Hours over time	Non Invoiced Hours	Yes	Jul 02 2013 08:04	Graphical chart

Billing Table

Billing is a specialized table hidden by default that can complement or replace the Time Entries table. It can track billable and non-billable hours that are related to any other table.

Figure 53. Sample Billing record.

Use Case

The Billing table is the only table represented as a field includable in other tables, Billing Field. Adding a field of type Billing Field to a table pulls the fields from the Billing table into the table as a set of linked fields with multiple values enabled. This allows users to create one or more billing records from within the current table. It also adds two calculated fields to hold the total billable and non-billable hours. Access permissions to the underlying billing table are required for users to create billing records from another table.

The Billing table itself is most often hidden from view and only available from the back end. Only Admin, Project Manager and Support Staff groups have access to the table by default, though the table's tab will remain hidden for all groups unless specifically reconfigured.

The Billing table is very similar to the Time Entries table, in that it tracks the time employees spend working on a ticket. In most cases, it is best to use the Time Entries table rather than the Billing table, since the Time Entries table has some advantages. When you show an embedded Time Entries table in another record, it is a related table, and as such, links are automatically created to the source record when an hour's record is created.

A Billing field created within another table is a different data type: link to selected fields with multiple values enabled. This means that if you edit a ticket and create a new billing entry from that ticket, the link back to the ticket will only be saved if you click Finish on the billing entry AND on the ticket itself. Otherwise, the billing record will be created, but not linked back to the ticket. Because billing records can become unlinked in this way through user error, we created the Time Entries table to replace it.

However, the billing data type has just one remaining advantage – it has special options to run an automatic timer when the user starts editing the record, and automatically put that amount of time in the Billable Hours field when the billing record is created. If you need this functionality, then you may

want to use Billing Field and the Billing table, but you must train users to be sure they understand how to use it correctly.

Ownership

Billing table records are owned by the user who creates them. Specifically, they are owned by user whose Login matches the Creator Login field.

SALES CRM TABLES

Leads Table

The Leads table is used as the initial point of entry for sales leads. Leads may self-register at your website or may be imported from a lead generation program or created by a sales person. The initial qualification is done in this table, which contains all the fields desirable for managing sales.

Once a lead is qualified, it may either be fully worked in this table, or converted into a contact, an opportunity, a location, and a company/account record, and the sales process may be managed in those records.

Figure 54. Sample Lead record.

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Use Case

Record Creation

Leads can be created using the web form or via email, once an inbound email address is set up for the Leads table. New leads may start out as Qualified or Unqualified in the workflow. The Leads table is set up by default to allow those in the Guest group to create records, allowing "click to register" lead generation hotlinks, and the embedding of the lead creation form in a web page.

Naturally, leads may also be imported from a spreadsheet from a lead generation program or manually created by a sales person.

If a Lead is created by a sales person, that sales person will be assigned by default as the Sales Rep. Otherwise a rule will assign the lead to members of the sales team on a round robin basis.

Processing Records

Admins and members of the Sales group can create, view, and edit leads. No other groups have access to the table by default.

When a lead's Status is changed to Converted and the record is saved, a new window opens to confirm the information that will be mapped into new records in four other tables: Location, Company, Opportunity, and People. This order of creation is important because both the Opportunity and People records will contain links to the original Company via the new record. If the Location and Company records are not created first, the People and Opportunity records will be unlinked and orphaned, disabling reporting features.

Data fields containing information relevant to the location, such as Location Name map to the Location record. Company specific fields, such as Company Name, company website, industry, Annual Revenue and number of employees, map to the Company record. Sales-specific data fields, such as key requirements, earliest and latest possible close date, and sales actions taken map to the Opportunity record. All data from the Lead referencing a specific person at the company map into a new Person record containing the individual's desk and cell phone numbers, email address, email preferences, work hours, and so on.

Email Marketing

Email marketing is set up for the Leads table by default. If you use the Campaign table to create email-marketing campaigns, you can send bulk emails to people in the Leads table and track the results in the related campaign and in the lead record. You are able to track any links, which are clicked in the email by the lead, and view those Email Clicks within the lead record itself.

Ownership

Records in this table are owned by the individual assigned Sales Rep, so each record is associated with a particular user login. Only members of the Sales and Admin groups can view or edit Leads.

Automation

Create: Campaign actions

Purpose: This handles the update of Campaign based on Lead source.

Runs: When created by web, email or API.

Search filter: No campaign but user entry (Lead created by self-registration and Campaign Name is blank)

Priority: 2

Actions:

U: Update Campaign from How did you hear

Updated Fields: Campaign Name

Updated Values: $lead_source

Create: If not created by sales person, assign leads round robin to sales team members

Purpose: This handles the assignment of a Leads to Sales Team members if the lead is not created by a sales person.

Runs: When created by web, email or API.

Search filter: Creator team does not contain Sales

Priority: 3

Actions:

U: Set Sales Rep to member of sales team

Updated Field: Sales Rep

Updated Value: Round Robin Assignment to Members of the Sales Team

Edit: Lead conversion

Purpose: This handles the interactive conversion of a Lead record into Location, Company, Opportunity, and People records.

Runs: When edited by web.

Search filter: Just Converted (Status changed from any value to Converted)

Priority: 3

Actions:

C: CONVERT to Company, Opportunity, Person

Conversion: Location, Company, Opportunity, Person

Options: Interactively, showing user the conversion dialogue and the results.

Create: Copy state/province to new fields

Purpose:

Runs: When created by web or API.

Search filter: None.

Priority: 1

Actions:

I: Set State Province

```
if (Country!='USA') {
     Set State/Province from State or Province
} else {
     Set State/Province from US State
}
```

Workflow

The Leads table has the following default workflow:
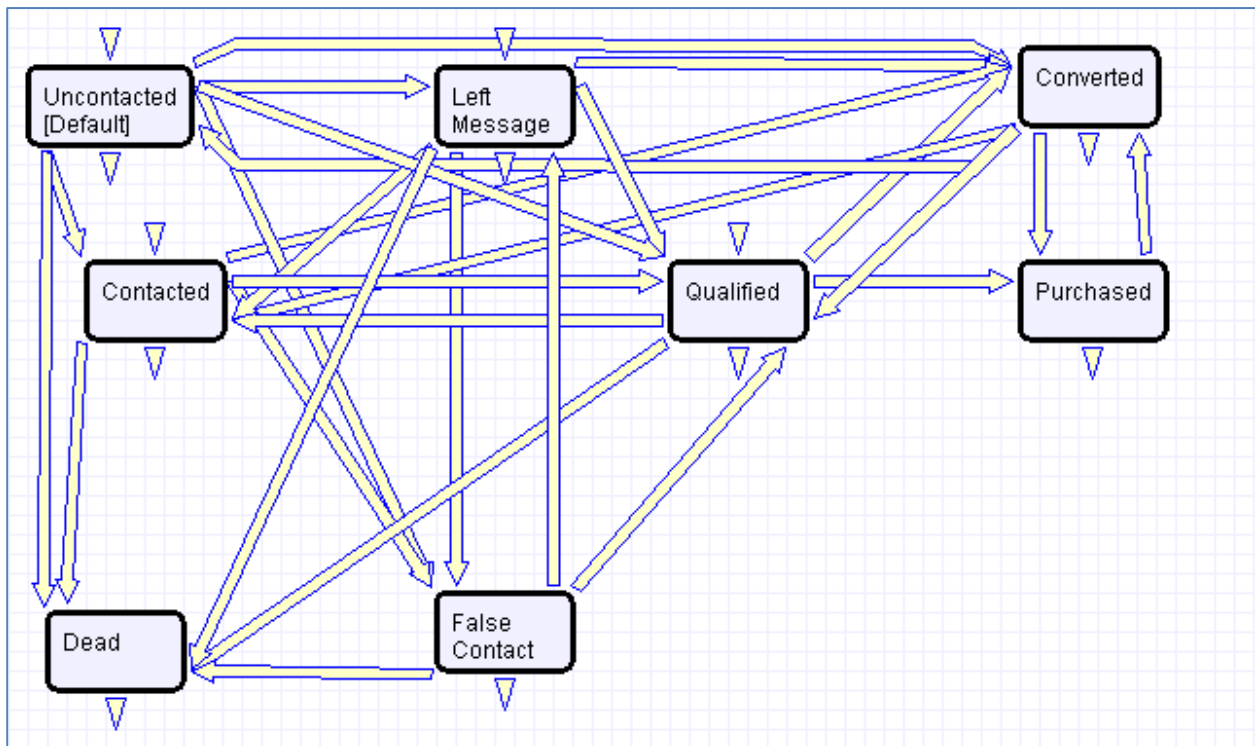
Reports

The Leads table contains the following default Charts/Reports:

Charts/Reports

Status: 10 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete

Views

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format
☐	📝	🔍	Active Leads by Sales Rep Pie Chart and Report showing Status	Status is active, not yet converted	No	Nov 03 2010 12:22	Graphical chart, HTML
☐	📝	🔍	All Leads by Sales Rep Pie Chart and report showing status		No	Nov 03 2010 12:22	Graphical chart, HTML
☐	📝	🔍	All Leads by Sales Rep Segmented Bar showing Status		No	Nov 03 2010 12:24	Graphical chart, HTML
☐	📝	🔍	Funnel for all sales	Status is active, not yet converted	Yes	Mar 14 2011 14:29	Graphical chart, HTML
☐	📝	🔍	Leads by Campaign		No		Graphical chart, HTML
☐	📝	🔍	Leads by Campaign segmented by Status		No	Nov 03 2010 12:20	Graphical chart, HTML
☐	📝	🔍	Leads Converted to Opportunities by Campaign	Converted Leads	No	Feb 14 2011 17:01	Graphical chart, HTML
☐	📝	🔍	My Funnel	All Leads assigned to me	Yes		Graphical chart, HTML
☐	📝	🔍	Number of Leads Created Last Calendar Month	Date Created is during last calendar month (C)	No	Mar 23 2012 13:54	Graphical chart, HTML, Excel
☐	📝	🔍	Uncontacted after 2 business days by rep	Uncontacted after 2 days	No	Nov 03 2010 12:12	Graphical chart, HTML

Opportunities Table

This table tracks sales opportunity information. Ideally, Location, Company, Opportunity, and People records are created by changing the Status of a qualified Lead to Converted.

Figure 55. Sample Opportunity record.

Opportunities may also be created directly or from within a company record for an already existing customer or prospect company.

Opportunities may be provided with price quotes through a related Quotes table that is shown in the Opportunity record. When forecasting future sales and measuring past sales results, where you run reports depends on whether you are using the Quotes table or the Opportunities table as your main source of financial value information for a sale.

Marketing campaigns can be associated with an opportunity by selecting a Type of Campaign. This will allow the marketing group to track the effectiveness of a campaign through active, dead or won opportunities in the Campaign table.

Opportunity records have native fields for the estimated Sale Value, Probability of Sale, and Estimated Close Date which are used in reports on the Opportunities table. It also has calculated fields showing the

value of all open and completed Quotations linked to this opportunity. These fields can also be used in reporting.

Use Case

Most Opportunity records are created from Leads via record conversion. Members of the Admin or Sales groups may create records manually.

Admins and members of the Sales group can create, view and edit Opportunities. Members of the Professional Services and Support Staff groups may view all Opportunities. No other groups have access to the table by default.

The Opportunities table tracks information on possible sales for your organization.

Ownership

Opportunity records are owned by the individual assigned Sales Rep. Specifically, Opportunities are owned by the user whose Full Name matches the name in the Sales Rep field.

Automation

TB: Look for next actions due tomorrow and remind Sales Rep

Purpose: This handles notifications for Actions with due dates.

Runs: At selected intervals, every five years at 4 PM

Search filter: R: Next Action due is tomorrow

Priority: 2

Actions:

E: Email Sales Rep of Upcoming Action

Notes: This time-based rule is disabled. If enabled, the schedule will need to be adjusted accordingly.
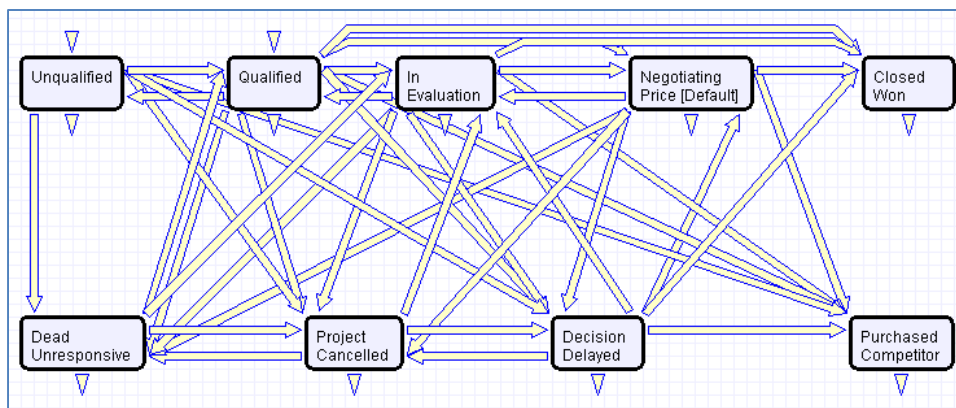
Workflow

The Opportunities table has the following default workflow:
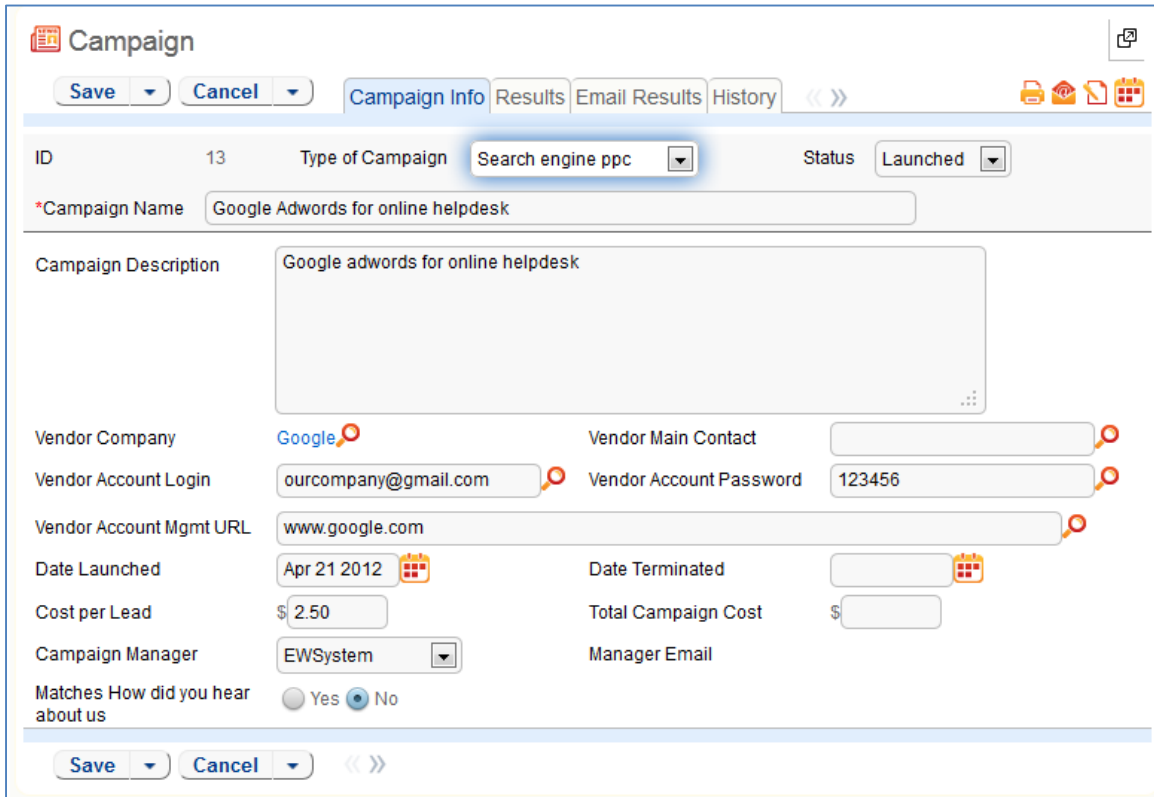
Reports

The Opportunities table contains the following default Charts/Reports:

Charts/Reports

Status: 22 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete

Views

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format
☐			Active Opportunities by Status with Estimated Value	C: active opportunities	Yes	Jan 18 2011 18:32	Graphical chart, HTML
☐			Active Opportunities Segmented by Company/ Estimated Value	C: active opportunities	Yes	Oct 27 2010 15:37	Graphical chart, HTML, Excel
☐			Active Opportunities Segmented by Industry, Estimated Value	C: active opportunities	Yes	Oct 27 2010 15:39	Graphical chart, HTML
☐			Average Time to Closed/Dead/Purchased Competitor	C: Inactive/Completed Opportunities	No	Nov 02 2010 15:15	Graphical chart, HTML
☐			Average Time to Closed/Won by Sales Rep	C: Closed won opportunities	No		Graphical chart, HTML
☐			Average Time to Closed/Won by Value of Completed Order	C: Closed won opportunities	No	Nov 01 2010 18:38	Graphical chart, HTML
☐			Forecast report by status for active Opportunities	C: active opportunities	Yes	Feb 17 2011 11:20	Graphical chart, HTML, Excel
☐			Forecast Report on open opportunities showing expected value	C: active opportunities	Yes	Jan 18 2011 18:46	Graphical chart, HTML
☐			Monthly Trend for past year, by estimated value		Yes	Oct 27 2010 15:48	Graphical chart, HTML, Excel
☐			My Opportunities Funnel Chart	My Assigned Opportunities	Yes	Nov 03 2010 16:09	Graphical chart, HTML
☐			Number and Value of Won Opportunities by Sales Rep	C: Closed won opportunities	No	Nov 01 2010 15:45	Graphical chart, HTML
☐			Number of Active Opportunities by Sales Rep Pie Chart	C: active opportunities	No	Nov 01 2010 16:42	Graphical chart, HTML
☐			Number of opportunities per month for past year segmented by rep		Yes	Oct 28 2010 11:47	Graphical chart, HTML
☐			Open Opportunities by Rep segmented by status	C: active opportunities	No		Graphical chart, HTML
☐			Open Opportunities by Status Funnel Chart	C: active opportunities	Yes	Mar 14 2011 15:57	Graphical chart, HTML
☐			Open Opportunities Gauge	Opportunities Only	Yes		Graphical chart
☐			Open Opportunities Segmented by Rating Funnel Chart		Yes	Mar 14 2011 15:50	Graphical chart
☐			Opportunities for past 3 months by current Status	C: Created in last 3 months	Yes	Oct 27 2010 15:41	Graphical chart, HTML
☐			Outcomes pie chart showing distribution of final statuses	C: Inactive/Completed Opportunities	Yes	Nov 01 2010 18:33	Graphical chart, HTML
☐			Stuck Opportunities by Sales Rep and Status	C: Stuck Opportunities	No	Nov 01 2010 16:49	Graphical chart, HTML
☐			Summary of Sales Activity for last 3 months		Yes	Oct 27 2010 11:22	HTML
☐			Trend showing number of opportunities per month over past year		Yes	Jul 02 2013 14:33	Graphical chart, HTML

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Campaigns Table

Every sales process involves a marketing aspect. A key marketing capability is tracking and measuring multichannel campaigns, including email, partner website, print advertising, purchased lists, newsletters, trade shows, radio, and TV.

Figure 56. The default tab of a Campaign record.

Use Case

The effectiveness of a campaign created by members of the Marketing group can be seen through its association with a Lead or an Opportunity. After creating a campaign, members of the Sales, Sales Manager or Marketing groups can choose that campaign in a Lead or Opportunity record by selecting a Campaign Name from a choice list created from Planned, Launched or Ongoing campaigns.

Record Creation

Campaigns can be created directly using the web form. New campaigns may only start out as Planned or Launched in the workflow.

Processing Records

Admin users and members of the Marketing group can create and edit Campaigns. Members of the Sales and Sales Manager groups have view access. No other groups have access to the table by default.

Email Marketing Campaigns

Email marketing tracking has been set up by default on the Leads and People tables. This works in conjunction with the campaign table, which contains many statistical fields to track the results of a sent email related to that campaign.

A marketing staff person sets up a Campaign to track results for a particular email. An email template may be created on the Leads and/or the People tables. Once the recipients are selected, mouse over the email icon and click Send Email:
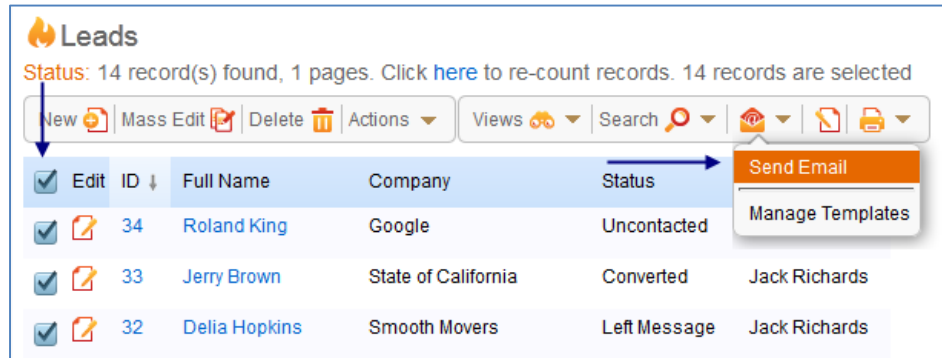
Figure 57. Select records, then use the email icon to send a mass email.

With the email window open, select Insert > Populate from template, then locate the desired marketing email template and import it. On the Options tab of the email dialog, the sender chooses the Campaign Name to use for email tracking:
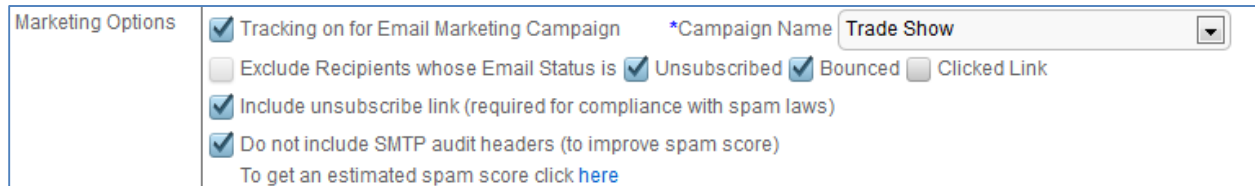
Figure 58. Choose the Campaign Name on the Options tab.

When the email is sent out, all responses are captured by a service running in the background and the results are compiled in the related campaign as responses are received:
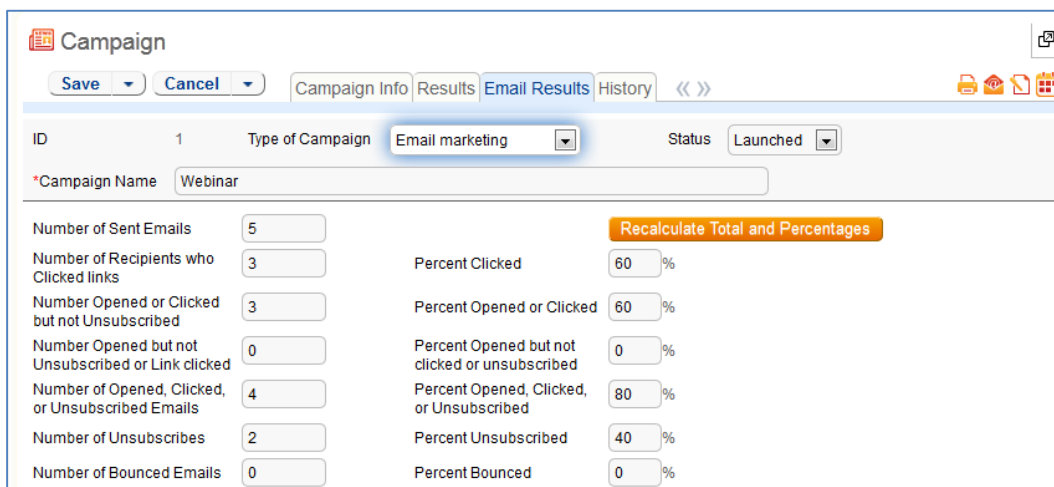
Figure 59. Responses are tracked on the Email Results tab.

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If there were links in the email and any recipients clicked them, then new records are automatically created in the Email Clicks table for each link clicked, and these are also shown in the campaign record:

Figure 60. A related table of Email Clicks is shown in the campaign record.

Further documentation about how the email campaign statistics are created and how to set up this functionality or modify it is available in our release note documentation at http://www.agiloft.com/documentation/email-marketing.pdf . This functionality can easily be turned on for additional custom tables other than Leads and People.

Ownership

Campaign records owned by the user who creates them.

Workflow

The Campaigns table has the following default workflow:

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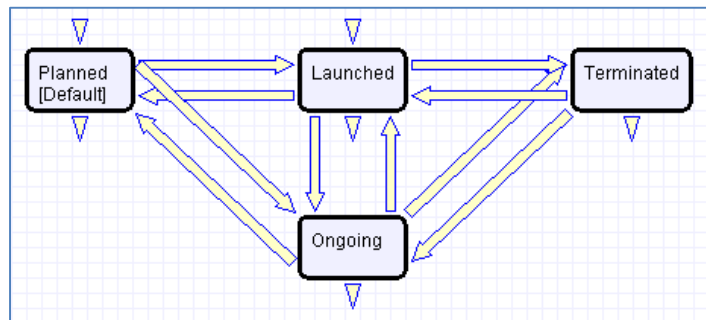
Reports

The Campaign table contains the following default Charts/Reports:

Email Clicks Table

Use Case

This table is used to store information about all links clicked in outbound marketing emails. The records are created automatically when a user clicks a link that was composed as a standard hyperlink in an outbound email from a table in which email marketing has been enabled.

This table is only visible if the Marketing function was selected when setting up Agiloft.

The records in this table are shown in a related table within the Campaign table records from which the emails were sent. It can also be made available in the left pane toolbar.

Figure 61. Sample Email Click record.

Ownership

Records in this table are owned by the user whose Login matches the Creator Login field.

Automation

All new actions

Purpose: This sets the Contact information and the source table based on email hotlink.

Runs: When created or edited by web or email and includes edits made by other rules during record creation

Search filter: None

Priority: 10

Actions:

I: Set Linked Contact

```
if (Email Linked Record Hotlink~='contacts') {
    Set Contact information and source table
```

Reports

The Email Clicks table contains the following default Charts/Reports:

Charts/Reports

Status: 2 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete   Views

Edit View	Title ↑	Filter	Published	Date Updated	Output Format
	All Clicks by Campaign then URL		No	Jun 19 2012 15:48	Graphical chart, HTML
	Clicks in past month by Campaign then URL	Created in past month	No		Graphical chart, HTML

Quotes Table

The Quotes table is used to create purchase quotes for prospects or existing customers. It can be used independently, or within the Opportunities table. If you use Quotes as your primary way of indicating potential sales value, Agiloft offers preconfigured reports for the Quotes table that will forecast your sales over the next period and will report on past success rates. If you do not use Quotes, you can run these kinds of reports from the Opportunities table instead, using fields such as estimated Sale Value, Probability of Sale, and Expected Close Date to track the value of potential sales.

Figure 62. Sample Quote record.

Use Case

Record Creation

A quote record is created with a default Status of Prepared. Upon saving the record, the quote is attached as a PDF to the record through an Attachment action. If a new quote is saved with a status of Sent to Customer, the quote is emailed to the prospect.

Processing Records

If the record is created and the Status is Prepared, the status can be changed to any one of the following states: Sent to customer, Expired, Revised, and Purchase Completed. If the status is changed to Sent to Customer at any time, a quote with the attached PDF will be emailed to the prospect.

Ownership

Quotes are owned by the Sales Rep who prepares them. Specifically, a Quote is owned by the user whose Full Name matches the name in the Quote Prepared By field.

Workflow

The Quotes table has the following default workflow:
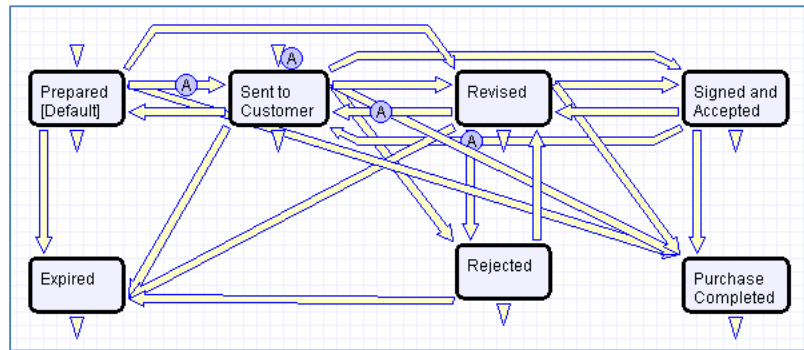
Workflow Automation

A: Attach Quote as PDF

E: Email prospect attached quote

Notes: These actions occur when a Quote is created in a Status of Sent to Customer or when the Status changes from any value to Sent to Customer

Reports

The Quotes table contains the following default Charts/Reports:

Products Quoted Table

The Products Quoted table holds the specific products associated with a quote.

Figure 63. Sample Product Quoted record.

Use Case

Record Creation

Product Quotes are created from the Quote table. As a Quote is created (independently or from the Opportunities table), each added item or product creates a Products Quoted record.

Processing Records

Admins and members of the Sales, Sales Manager, and Marketing group can create, view and edit Products Quoted. Only Admins and Sales Managers are allowed to edit quoted products created by other Sales, Marketing or Sales Manager members. No other groups have access to the table by default.

When a product is added to a Quote record and saved, the Total Price is updated by a calculation based on the Unit Price, Number of Units and Discount Percentage. When the quantity of an item in a quote is changed, the Total Price of the quoted product is updated.

Ownership

Records in this table are owned by the person who created the associated Quote. Specifically, a record is owned by the user whose Full Name matches the Quote Prepared By field.

Reports

The Products Quoted table contains the following default Charts/Reports:

Products Table

The Products table holds products that your company sells and the product values are pulled into Opportunities and Products Quoted.

Figure 64. Sample Product record.

Use Case

Record Creation

Product records can be created directly using the web form. Product records need to be created before they are available in any of the other tables such as Products Quoted.

Processing Records

Admin users and members of the Sales Manager group can create and edit Products. View access is limited to members of the Marketing, Sales and Support Manager and Support Staff groups. No other groups have access to the table by default.

Products are categorized by the type, e.g. Part, Software or Service. Products that are no longer needed can be marked Inactive and will not appear in drop down lists when quoting a product.

Ownership

Records in this table are owned by the user who creates them.

Reports

The Products table contains the following default Charts/Reports:

DOCUMENT MANAGEMENT TABLES

Documents Table

This table can be used to manage the creation and publication of documents of various types, from marketing collateral to employee procedure manuals. A simple publication approval process is included.

Examples of documents that may be covered: official memos, published company policies, user manuals, newsletters, press releases, and so on. The table may be used to manage documents that are accessed only through Agiloft (through the records in this table), as well as documents published at the company website, intranet or printed and distributed. Access to documents is controlled through permissions based on the Document Access choice field in the record.

Use Case

End User Record Submission

An end user belonging to the Document Creator Team can create a document record through the EUI. Action buttons are available to the end user to move the document through the workflow.

When a user submits a document for review, the Submitter Information fields automatically populate based on the details in the user's record (Submitter, Submitter Department). A direct link to the Department and the Department Manager will be auto-populated based on the submitter's department.

Document records are created with a default Status of Draft. After supplying the required information and uploading a document, the user clicks Submit for Review to begin the review process. The Status of the record is the updated to Pending Review. If the user is not ready to submit the record, the record can be saved for future updates.

Staff Record Submission

Staff users in the Document Management, Document Creator and Admin groups can submit documents. Only Admins and Document Managers can update the Status of a document record manually. All other groups use action buttons to move documents through the workflow.

Document records are created with a default Status of Draft. After supplying the required information and uploading a document, the user clicks Submit for Review to begin the review process. The Status of the record is then updated to Pending Review. If the user is not ready to submit the record, the record can be saved for future updates.

A Document Manager may skip the Pending Review status by adding document Reviewer(s) from the Progress tab (the Requires Approval field must be set to Yes). Pressing the Submit for Approval button then moves the document directly to the Pending Approval status.

Processing Records

When a document record is submitted, the Document Management Team is assigned by default and notified. A Document Manager reviews the document for content and formatting, and to determine if the document requires additional review.

If there are any issues with the initial document, the Document Manager clicks Return to Submitter to send the document back to Draft status. A rule then notifies the Submitter that the document requires revision. The user makes appropriate updates to the document and record, then clicks Submit for Approval again.

Figure 65. The common area holds action buttons to control the document workflow.

Handling Approvals

The Requires Approval field on the Progress tab determines whether approvals are needed before publication.

If the document does not require approval by document Reviewer(s), the Document Manager clicks the Publish without Approval action button. The Submitter is notified that the document has been published. If the Requires Approval field is set to Yes, a validation rule notifies the Document Manager that approval is required if the Document Manager attempts to publish without approvals.

Selecting Approvers and Creating Approvals

If the document requires approvals by Reviewer(s), the Document Manager will select the appropriate reviewers by adding reviewer names under the Potential Reviewers heading on the Progress tab. This field is a *link to a single field* (Full Name) with multiple values enabled in the Employee table, displayed as a multiple value box with a popup selection list and filtered to people on the Document Reviewers Team.

Figure 66. Use the lookup icon to select Reviewers.

After selecting the appropriate Reviewer(s), the Document Manager clicks Submit for Approval, or manually changes the Status of the record to Pending Approval. A validation rule checks to see if the Document Manager has actually added reviewers to the form.

When the record is saved, an approval record is created for each reviewer by a conversion process from the reviewer's Employee record. A *linked record action* updates the Last Document ID field in the Employee record.

When the system detects a change in the Last Document ID field it performs a *data conversion action,* using the employee record to create an Approval record. The approval record is linked to the document record through the mapping of Last Document ID field to the linked Document set in the approval

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record. Additional reviewers can be added during the approval process; automation rules and actions will prevent the creation of multiple approval records for existing approvers.

The default Approval Status for new approval records is Pending Approval. When an approval record is created, the reviewer is automatically notified that they have a document to review and approve. In the Approval record, the **linked field** set from the document record includes a hyperlink to the document using the view only source field display option for the Document(s) field under the Attachment heading. The reviewer can click the link to open the document, allowing the reviewer to mark up the document which can then be uploaded to the approval record (reviewers are not able to upload the document to the source record). All updates to the document will be done by the Submitter, the Document Manager or an admin.

Rejecting Documents

The reviewer may either approve or reject the document and provide Approval Notes. If the approval record is rejected, the reviewer must provide Approval Notes explaining why the document is rejected. A validation rule reminds the reviewer that they must provide rejection notes if a reviewer attempts to reject the approval without providing notes.

When any of the approvals are rejected, a rule in the Document table detects this via a *calculation on multiple linked records* field that keeps track of the number of rejections. When this field is updated by rejections, the rule sets the document's Status to Draft, emails the Submitter that the document requires an update, and sets a trigger field named Document Rejected, Requires Update in each of the linked approvals to Yes.

Setting the Document Rejected field to Yes in the approvals then triggers the rule below that sets the Approval Status field in all of the linked approvals to Requires Reapproval, unless that Approval already has a value of Rejected.

Since any rejected Approvals set the Status of the document back to Draft, the process essentially starts over. The Submitter can review the comments made by the reviewers and see any red-lined documents that have been attached to the approval records. Then the Submitter edits the document and presses the Submit for Review button again to change the Status of the Document to Pending Review and notify the Document Manager. The Document Manager can then keep the same Reviewer(s) or change them and Submit for Approval again. If a document is rejected by an approver and then accepted again (and the Status therefore changed from Pending Approval to Draft and back to Pending Approval), the status of all of the linked approvals is restored to Pending Approval, and all Reviewer(s) are notified by email.

Publishing Documents

Once all approvals are completed and the value of the field Total Number Still Awaiting Approval is 0, a rule sets the Status of the document to Ready for Publication. Both the Submitter and Document Manager are emailed that the document is ready for publication.

The Document Manager can then attach the final approved document to the Published Files field and update the Status to Published. A validation rule checks again to see if there are still any pending approvals.

Once the Document is published, an email notification is sent to the Submitter.

Figure 67. Sample document record: Details tab.

Ownership

Document records are owned by the person who submits them. Specifically, records are owned by the user whose Full Name matches the Submitter field.

Group Permissions

Document Creators

- Can create, edit, and delete their own Documents.
- Can view FAQs for the Documents table.
- Can edit various details and notes for the document and set the audience.
- Can view the Reviewers and Approvals, but not edit them.
- Can submit the document via an action button, but cannot change the Status manually.
- Can view Approval records.

Document Managers

- Have full create/edit/delete control over all Documents
- Can set Requires Approval in Documents, and can assign document Reviewer(s) to each document.
- Can manually change the Status of documents.
- Can view and edit their own Approvals, and Approvals that are related to Documents.
- Can delete Approvals that are related to Documents.

Document Reviewers

- Can view documents but has no edit permissions.
- Can view and edit Approvals if they are the selected approver for that Approval and the Status of the Approval is Pending Approval.
- Can edit Approval Status and Approval Notes, as well as redline and upload the document via the Document(s) field (file with versioning).

Automation

All Edit Validations

Purpose: This rule handles all validation actions when a Document is edited.

Runs: When edited by email or web.

Search Filter: None.

Priority: 5

Actions:

I: All Edit Validations

```
if (Status='Pending Approval' and Requires Approval='Yes' and Number of Potential Reviewers<1) {
      Must Provide Potential Approvers
}
if (Total Number Still Awaiting Approval>=1 and Status changed from: any value to: any of 'Published','Ready for Publication' last user's modification) {
      if (Requires Approval='Yes') {
            requires approval before publishing
      } else {
            remind that they don't have approval yet
      }
}
```

Edit: Last Approval Received (API Enabled)

Purpose: This rule updates the Status and notifies the Submitter and Document Manager that the document is ready for publication.

Runs: When edited by email, web or API.

Search Filter: R: Final Approval just received

Priority: 5

Actions:

U: Set Status to Ready for Publication

Updated Field: Status

Updated Value: Ready for Publication

E: Email Submitter Document Ready for Publication

E: Email Document Mgr that Document is Ready for Publication

Edit: All Edit Actions without API

Purpose: This rule handles all edit actions, including email notifications to Submitter and Document Manager of Status changes, and updates linked approval records.

Runs: When edited by email or web.

Search Filter: None.

Priority: 1

Actions:

I: All Edit Actions

```
if (Status changed from: 'Pending Approval' to: 'Draft' last user's modification) {
     Email Submitter Document Requires Update
} else if (Status changed from: any value to: 'Published' last user's modification) {
     Email Submitter of Published Document
} else if (Status changed from: any value to: 'Pending Review' last user's modification) {
     Email Document Mgr that Document is Pending Review
} else if (Status changed from: any value to: 'Ready for Publication' last user's modification) {
     Email Submitter Document Ready for Publication
}
if (Reviewer(s) changed from: any value to: any value last user's modification and Reviewer(s)!=NULL and Status='Pending Approval') {
     Update Last Document ID in Employee
}
if (Status changed from: any of 'Draft','Pending Review' to: 'Pending Approval' last user's modification and (Total Number of Requires Reapproval>=1 or Total Number of Rejections>=1)) {
     Update Linked Approval Records to Pend Approval
}
```

Create: All Creation Actions

Purpose: This rule handles all creation actions, and emails the Document Manager if the initial Status is Pending Review.

Runs: When created by email, web or API.

Search Filter: None.

Priority: 1

Actions:

I: All Creation Actions

```
if (Status='Pending Review') {
      Email Document Mgr that Document is Pending Review
}
```

Edit: Handle Rejection of an Approval (Web or API)

Purpose: This rule handles all actions if an Approval is rejected.

Runs: When edited by web or API.

Search Filter: R: Has one or more rejections and status is not draft

Priority: 4

Actions:

U: Set Status to Draft

Updated Field: Status

Updated Value: Draft

E: Email Submitter Document Requires Update

L: Set Document Rejected field to Yes in linked Approvals

Chain: Document ← Approvals

Linked Action:

U: Set Document Rejected to Yes

Updated Fields: Document Rejected, Requires Update (Approvals table)

Updated Value: Yes

Workflow

The Documents table has the following default workflow:

Reports

The Documents table contains the following default Charts/Reports:

DOCUSIGN TABLES

Overview

[DocuSign](link)is the leading eSignature solution in the market, allowing easy, efficient, and secure signing of electronic documents. Accessible anytime, anywhere, on any device, businesses of all sizes and industries are replacing manual, paper-based signature methods with DocuSign's electronic signatures.

Agiloft provides embedded integration with DocuSign, and has completed an extensive certification process by DocuSign to verify that the Agiloft API (Application Programming Interface) is compliant with all DocuSign and e-signing standards requirements. You will need to set up an account at DocuSign before configuring the Agiloft interface.

The DocuSign website a[t www.docusign.com](link) has a great deal of information, FAQs, whitepapers, videos, etc. which explain the entire e-sign infrastructure and the particular DocuSign how-to's. To learn more about the DocuSign solution itself, start here[: https://www.docusign.com/faq](link).

Turning on the DocuSign extension creates several tables, fields, and actions in Agiloft. The Agiloft template has been preconfigured with DocuSign to the extent possible without a DocuSign production account, so these tables and fields are already created for you.

To use DocuSign with Agiloft, you will need a Business or Enterprise license for at least one DocuSign user. Anyone in Agiloft who will send a contract document for signature via DocuSign will need a corresponding DocuSign user account. A DocuSign administrator account will be needed to complete the initial configuration within Agiloft.

For full details on how to complete the configuration of DocuSign to deploy it, please review the *DocuSign Users Manual* at [http://www.agiloft.com/documentation/docusign-users-manual.pdf](link). The manual gives a full, detailed overview of how to use DocuSign and how it works. For instructions in how to set up your DocuSign account and connect to it from Agiloft, review in particular pages 13-23.

Use Case for Signing Contracts

The system is currently configured to use DocuSign with Contracts. Note that DocuSign integration can be added to any table in Agiloft by creating a DocuSign action in that table to create an envelope and adding the DocuSign Envelope and DocuSign Recipients related tables to the other table.

For contracts, the DocuSign process begins by pressing the Create DocuSign Envelope action button on the DocuSign tab of a contract record. This buttons runs a DocuSign action, and that action can be edited if you have a different preferred configuration of signers. It is currently set to use one internal signer and up to two external party signers. These fields are on the Details tab of the contract record and should be filled in during the contract process.

When the button is used to create the envelope, the user may click a Create & Preview button in the Envelope record to go directly to the envelope in DocuSign and preview everything before clicking the Send button to launch the signature process.

Further details of this process are provided in the Contract section of this document, as well as in the *DocuSign Users Manual*.

Print Templates

We have set up a few sample print templates with DocuSign tags to use as a guide for your own contract print templates. One template, simply a page with a tagged signature block, is on the Attachments table, and the others are in the Contracts table.

The tagging process is fully discussed in the manual, but to see the sample documents in the system, go to Contracts, then mouse-over the printer icon and click Manage:

Each of the three templates has DocuSign tags in the Signature area – the tags are not visible unless you mouse over the text and apply a different text color. The tags are stored in white font color so they do not appear on the final signed document.

If you add more signers or change the basic signing configuration, you will need to create your own tagged signature blocks.

The sections below describe the system tables which are related to DocuSign usage.

DocuSign Users Table

This table holds a record for each Agiloft user who will be sending documents to DocuSign (by creating the envelope and clicking the Send button). Each record must have a valid DocuSign login to enable sending.

The DocuSign Administrator and DocuSign Users (Senders) must be set up at the DocuSign website first. The user must also exist in the People/Employees table in Agiloft. To set up the DocuSign User in Agiloft, click New in the DocuSign Users action bar to bring up the screen below:

Figure 69. Sample DocuSign User record.

Look up the user by typing their name or login into the fields and using the lookup tool.

- Full Name – the user's Full Name in Agiloft must match the name input at DocuSign.
- DocuSign User Name (Email) – must match the email address input at DocuSign.
- DocuSign Password – must match the password input at DocuSign (you must type this in).

Then click the Grant Access to DocuSign action button to finish adding the DocuSign user.

DocuSign Users (senders) will have account records on both Agiloft and DocuSign. DocuSign Recipients (signers) are not required to have Agiloft or DocuSign account records.

Every person who sends out documents for signature (called a "DocuSign User" in Agiloft and a "User with Sender Permissions" at DocuSign) must have a user record in the following places:

- The People/Employee table of Agiloft
- The DocuSign Users table
- The Users table of the company's account at DocuSign

A successfully created DocuSign User record will look like the screenshot below:

Figure 70. A DocuSign user with access granted.

At this point, the person is set up to send documents for e-signing through Agiloft and DocuSign.

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Automation

Two rules run on the DocuSign Users table to add or remove the Agiloft DocuSign User to or from the list of valid users in the linked DocuSign Account.

These rules should not be deleted.

Add to DocuSign User group

Purpose: This script action adds new or updated DocuSign User to linked DocuSign account.

Runs: When created or edited by web or API.

Search Filter: None.

Priority: 0

Actions:

> *?: Add to DocuSign User Group*

Revoke Access to DocuSign

Purpose: Script actions remove user from linked DocuSign account when deleted from the system.

Runs: When deleted by web or API.

Search Filter: None.

Priority: 0

Actions:

> *?: Revoke Access to DocuSign*

> *?: Remove from DocuSign User group*

> **Notes:** These Script actions cannot by edited.

DocuSign Roles Table

This table is used to name the **roles** that will be assigned to Signers and people identified as Recipients in the Agiloft DocuSign Action which creates the DocuSign Envelope. It is prepopulated with four roles: Customer3, Customer2, Customer1, and Internal Signer.

When choosing recipients from within the DocuSign Action wizard, the admin selects from this list for each recipient. The role name is used in the DocuSign tags that are added to the document to match a Signer to his role, and the role names must match exactly.

New roles may be added as needed and applied to the Signers and the document tags.

DocuSign Envelopes Table

This table holds the DocuSign Envelopes, which contain a link back to the Contract record from which they were created in the Linked Record field. The table also contains an embedded table of the DocuSign Recipients list and the Attached Documents field which holds the attached files to be reviewed/signed.

By default, a DocuSign Envelope is created when a user clicks the Create DocuSign Envelope in the DocuSign Envelopes tab of a Contract record. The DocuSign Envelopes tab of a Contract is currently visible only to users in the admin and DocuSign Users groups.

How the envelope and recipients are populated depends on the configuration of the action run by the Create DocuSign Envelope button, and it may be changed by updating the action.

Figure 71. Sample DocuSign Envelope record.

The Status of an Envelope is updated automatically based on its progress at DocuSign. Once it has been sent to DocuSign, it will have a Status of Created and will show the Envelope ID at DocuSign. As each Recipient signs, the Status of the Recipient record will be updated to Completed.

More details on working with DocuSign Envelopes are provided in the section "Create a DocuSign Envelope" in the *DocuSign Users Manual*.

Ownership

DocuSign Envelope records are owned by the sender of the envelope. Specifically, records are owned by the user whose Login matches the Sender Login field.

Automation

Edit: Convert to Attachments and set Contract to Signed when Status is Completed, API only

Purpose: This rule updates the linked contract when the envelope Status changes to Completed. The rule sets the Status of the linked contract to Signed.

Runs: When edited by API.

Search Filter: R: Status has changed to Completed

Priority: 10

Actions:

L: Set Contract Status to Signed

Chain: DocuSign Envelopes table/Contract ID field → Contracts table/ID field

Linked Action: U: Set Status to Signed

Updated Field: Status (Contracts table)

Updated Value: Signed

DocuSign Recipients Table

This table holds the Recipients for a particular DocuSign Envelope. They are linked to the DocuSign Envelope record and to the Contract record from which the Envelope was generated. The Recipient records are created automatically based on the configuration of the DocuSign Action that generates the DocuSign Envelope record. Recipients can also be added manually to a DocuSign Envelope if needed.

The Send Order controls the order in which signatures are requested by DocuSign. Each Recipient should have a different Role Name for a given contract.

Figure 72. Sample DocuSign Recipient record.

The DocuSign Envelope and DocuSign Recipients tables are usually accessed from within a contract record.

Ownership

DocuSign Recipient records are owned by the user whose Login matches the Sender Login field.

GLOBAL TABLES

Agiloft Requests Table

The Agiloft Requests table is used for tracking implementation tasks and configuration change requests during the Agiloft implementation process. For companies whose implementation is initially done by Agiloft implementation staff, this table is used to submit requests for changes and problem reports during the initial implementation, testing, and rollout. It may also be used after the system is live to allow users of the system to request changes, report problems, and ask questions about the configuration.

Customers whose systems are subject to auditing and compliance regulations typically use such a table to track and provide an audit trail of all significant configuration changes, often adding a layer of approvals before changes are made to a production system.

This table is deactivated by default, but can be turned on by going to Setup > Tables, selecting the Agiloft Request table and pressing Activate. It will then be immediately available to Admin users in the left pane. To give permission to another group to use the table, go to Setup > Access > Manage Groups

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and edit the desired group. On the Table tab of the Groups wizard, select the Agiloft Requests table, then set the option Show table on the Toolbar? to Yes. Modify access as needed to create, view, and edit records or fields on the remaining tabs of the Group wizard.

Figure 73. The Agiloft Request table is used to track needed changes during an implementation.

Use Case

During the implementation phase, it is expected that Internal Implementation team users will be submitting requests to the Agiloft Implementation Team for handling. Once the system is live, the table may be modified (for instance the default Assigned To may be changed) to be used by internal staff submitting issues for handling by the Internal Implementation or Admin team.

There are two main teams related to this table. The Agiloft Implementation Team should be the primary team of any Agiloft employees who are involved in the implementation. The Internal Implementation

Team should be the Primary Team or one of the Teams of the internal admin users who are responsible for configuring or maintaining Agiloft.

The table is used by employees of Agiloft, who are on the Agiloft Implementation Team, and by internal admin users responsible for the implementation of the system, who are on the Internal Implementation Team. Members of these teams need to be in Admin group, because they need access to and the ability to edit the entire system.

Record Creation

Records are assigned by default to the Agiloft Implementation team. Initially, by default only the user ewsystem is on this team and this user has no email address, so the Agiloft employees that will be working on the implementation need to be set up as system users. The Assigned To field is filtered to the Agiloft Implementation Team or Internal Implementation Team or any contacts whose Teams field contains one of those two teams. This may be broadened as needed.

When a new Agiloft Request is created, the assigned team is emailed (if a user on the team exists with an actual email address) notifying them of the request.

In addition, the submitter and any additional cc's are emailed an acknowledgement email with the record ID and details.

Processing Records

When a person whose primary team is the Agiloft Implementation team updates the Answers/Notes field, the submitter and additional cc's are notified along with the members of the Internal Implementation Team, unless the user changes the Email Behavior field to "Don't send emails", which will prevent any automatic email from being sent.

When the Status is changed to Done or Deferred, a special email is sent to the submitter, additional cc's and Internal Implementation Team, telling them the request has been resolved and letting them know that they can change the Closing Confirmation field to reopen the record if they feel this is needed.

If an Agiloft Implementation team member changes the Assigned To field to a value other than his own name, the new assignee will be emailed.

When someone whose primary team is NOT the Agiloft Implementation team updates the record, the assignee is notified unless the updater changed the Closing Confirmation to some value other than Not Resolved –Reopen or they set the Email Behavior field to "Don't send emails".

If the status at the time of the update is Waiting for Internal Admin or Waiting for Submitter Input, or if it is Done and the Closing Confirmation was just set to Not Resolved- Reopen, then the status is changed to Assigned and the assignee is emailed.

If the Email Behavior field is changed by a user to "Don't send emails" after the first edit rule has run, another rule sets the flag back to its default value of Send Automatic Emails.

Ownership

Records in this table are owned by the user who submits them. Specifically, a record is owned by the user whose Full Name matches the Submitter Name.

Automation

Create: All creation actions

Purpose: This handles all notifications for new requests.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

I: All new record actions

```
if (Email Behavior='Send automatic emails') {
     Email assignee of new request
     Email submitter acknowledgement of new request
```

Edit: All edit actions no api

Purpose: This handles all notifications and status updates for edited requests.

Runs: When edited by web or email.

Search filter: None

Priority: 2

Actions:

I: All edit actions

```
if (Updater Team='EW Implementation Team') {
    if (Status changed from: any value to: any of 'Deferred','Done' during record's last modification) {
        if (Closing Confirmation!=NULL) {
            Set Closing Confirmation to empty
        }
        if (Email Behavior='Send automatic emails') {
            Email submitter when Done
        }
    } else if (Answers/Notes changed from: any value to: any value during record's last modification and Email Behavior='Send
    automatic emails') {
        Email update to submitter and ccs
    }
    if (Assigned To changed from: any value to: any value during record's last modification) {
        email new assignee for existing request
    }
} else if (Updater Team!='EW Implementation Team') {
    if (Status='Waiting for Internal Admin' or Status='Waiting for Submitter Input' or Status='Done' and Closing Confirmation changed
    from: any value to: 'Not Resolved - Reopen' last user's modification) {
        Set Status to Assigned
        Email assignee of update by other
    } else if
    (Closing
    Confirmation
    not changed
    during record's
    last
    modification
    and Email
    Behavior='Send
    automatic
    emails') {
        Email assignee of update by other
```

Create/Edit: Reset Email Behavior flag (Web only)

Purpose: This handles the reset of the email behavior.

Runs: When created or edited by web.

Search filter: R: Email behavior is don't send emails

Priority: 3

Actions:

U: Set Email behavior to send emails

Updated Field: Email Behavior

Updated Value: Send automatic emails

Workflow

The Agiloft Requests table has the following default workflow:
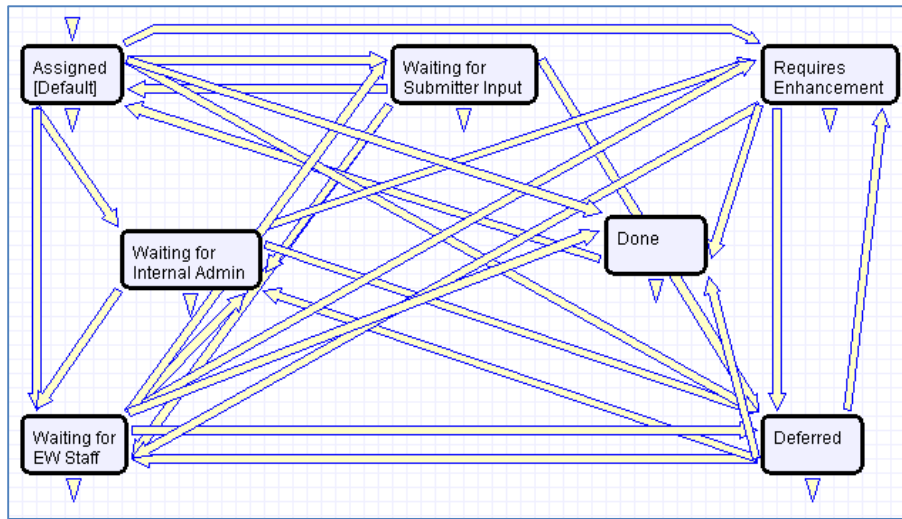
Accounting Periods Table

This table is included in the Demo KnowledgeBase as an example of how to use a choice field for a time period while associating it with an actual date range for reporting.

Figure 74. Sample Acct Period record.

Use Case

The Accounting Periods table itself is hidden from view and only available from the back end.

Ownership

Records in this table are owned by the user who creates them.

Replacement Variables Table

The Replacement Variables table is a background table that can be used to support any of the process tables included in the Demo KB, such as Approvals, Contracts, Projects, or Tasks. Replacement Variable records store a **variable chain** used to pull in values from a linked field relationship. Generally, these variables are copied into template records (e.g., in the Approval Templates table) and then used to dynamically assign records or set other field values when a process table record is generated from a template.

Figure 75. The Replacement Variable table stores field variables used by automation in other tables.

Use Case

Replacement Variables are used by Approval Templates to generate Approval records for Contracts.

To create a Replacement Variable that will be used in Approvals, set Used In Field to the value "Approval Assigned To". The value in the List Value field will shows up in the Assign To drop-down in an Approval Template. Last, create a **variable chain** from the Approvals table to the appropriate field variable. For example, `$contact_id.requester_name` finds the name of the Requester in the linked Contract record, while `$contract_id.requester_id.manager_name` finds the Requester's manager.

> *Caution: The Variable should be a variable chain that starts from the Approval record—not from the Approval Template!*
>
> *Admin Note: The values "Task Assigned To" and "Other" do not link to any automation in the default setup, but they can be deployed and used with minor modifications to Task Templates or other template table.*

To use a Replacement Variable in an Approval Template, staff users can create an Approval Template and set Assign Approval Based On to the value "Person from Contract". The user can then select a value for the Assign To dropdown, which contains a link to all Replacement Variable records for which Used in Field is "Approval Assigned To". When an Approval is generated from that Approval Template (see the WORKFLOWS TABLE section and the HANDLING APPROVALS section), the Approver is set using the variable chain in the Variable field from the Replacement Variable record.

Ownership

Records in this table are owned by the user who creates them. Specifically, a Replacement Variable record is owned by the user whose Login matches the Creator Login field.

Tasks Table

The Tasks table can be used to support any of the applications included in the Demo KB, such as Sales, Helpdesk, Change Requests, Support Cases, and Projects. Task records provide a framework for tracking and completing various units of work. Tasks may be related to records in any other table and multiple tasks are shown as an embedded table within those records.

Figure 76. Sample Task record.

Use Case

Tasks can be created in several tables by staff users. A Project or Helpdesk Case with the selection: Service Request > New Employee Setup can automatically generate tasks in sequence, determined by Task Template records. Tasks are linked to the record which generated it, and are displayed in a related table within the generating record (e.g., Project or Helpdesk Case). See the sections on those tables for a detailed description of their behavior.

Otherwise, if generated manually, a new task record must have the Title entered, and a related table specified in the Related To field. There are a number of additional fields that specify items such as the Assigned Team, Assigned Person, Status, various dates, files, Description, and any notes taken in the progress of performing and documenting the task.

The Related Info tab shows the preceding task record if the current record is part of a sequence. The Time Spent tab shows the records related to this task in the related Time Entries table. It also shows a small time entry form, where clicking the Add Time button creates a new Time Entry record related to the current task record with the information entered in the Time Spent and Time Description fields.

Through automation described below, the task record automatically notifies (via email) its assignee when the Assigned To field is changed (including when the task is created, if assigned at that time.)

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Other automation includes notifications of upcoming tasks and due dates. The rule "TB: notify of upcoming activity", described below, must be enabled to function and its filter adapted to your needs.

As part of the project management automation, the system also updates fields in related Task Template and Project records to control the automation of projects and tasks. The details on that behavior can be found below and in the documentation entries for those two tables.

Ownership

Task records are owned by the individual assigned to the task. Specifically, a Task record is owned by the user whose Full Name matches the Assigned Person field.

Automation

Create: All create actions

Purpose: This handles linked company updates, due dates for estimated hours of completion and assignment notifications.

Runs: When created by web, email or API.

Search filter: None

Priority: 2

Actions:

I: All Create Actions

```
if (Company Name!=NULL) {
      Set Company to Contact Company
} else if (Opportunity Company!=NULL) {
      Set linked company from opportunity
} else if (SC Company!=NULL) {
      Set linked company from SC company
}
if (Template Assign Task Based On='Project Manager') {
      Assign to PM and set Team to PM Primary Team
} else if (Template Assign Task Based On='HelpDesk Assignee') {
      Assign to HD Assignee and set team to his primary team
}
if (Related To='Project') {
      Refresh task calculation in project
}
if (Source Template ID!=NULL and Template Number of Hours to Due Date!=NULL and Date Due=NULL and Status!='Done') {
      Set Due Date to date created + number of hours to Due Date
}
```

I: Notify assignee(s) on creation

```
if (Assigned Person!='$created_by') {
      if (Assigned Person!=NULL) {
            Email Assignee of New Task Assignment
      } else {
            Email Assigned Team of New Task Assignment
      }
}
```

Create: All create validations

Purpose: Prevent addition of tasks to completed or cancelled projects, prevent creation of tasks with due date in past.

Runs: When created by web.

Search Filter: None

Priority: 1

Actions:

I: All Create Validations

```
if (Project Status='Completed' or Project Status='Cancelled') {
      Cannot add task to completed project
}
if (Date Due<this day) {
      warn that due date is in the past
}
```

TB: Set Alert Color

Purpose: Sets flag field for coloring.

Runs: Daily.

Search Filter: R: Due date is today and status is not Done or Cancelled

Priority: 30

Actions:

U: Set Alert color to Red

Updated Field: Alert Color

Updated Value: Red

Edit by API: Trigger Next Tasks when completed

Purpose: Sets fields in upcoming template that triggers template to convert a record to create a new task.

Runs: When edited by API.

Search Filter: R: Status Just Changed to Done or Cancelled

Priority: 20

Actions:

I: Set Trigger in next Templates

```
if (Next Template IDs!=NULL) {
    Push Project fields to next Templates
}
```

Edit: Actions when completing or cancelling

Purpose: Handles cleanup of helper fields, Assigned Person, begins task sequence if appropriate, and notifies the Project Manager about the closing or cancelling of the task.

Runs: When edited by email or web.

Search Filter: R: Status Just Changed to Done or Cancelled

Priority: 10

Actions:

I: Edit actions when closing or cancelling

```
if (Status='Done' and Source Template ID!=NULL) {
    Set next Template IDs
}
if (Assigned Person=NULL) {
    Set Assigned Person to person who closed
}
if (Project Manager!=NULL and Project Manager!='$updated_by') {
    Email Project manager of closed or cancelled task
}
if (Alert Color='Red') {
    Set Alert color to default
}
```

Edit by Web or API – update alert color if due date changes

Purpose: This rule runs if the Due Date changes during the last edit, and updates the alert color if needed.

Runs: When edited by web or API.

Search Filter: None.

Priority: 5

Actions:

I: Edit actions by web

```
if (Date Due changed from: any value to: any value during record's last modification and Status>'Done') {
    if (Alert Color='Red' and Date Due>=1 day in the future) {
        Set Alert color to default
    } else if (Alert Color!='Red' and Date Due>=1 minute old) {
        Set Alert color to Red
    }
}
```

TB: notify of upcoming activity (disabled)

Purpose: Checks to see if tasks are due soon and notifies the assignee of those that are.

Runs: (disabled).

Search Filter: Upcoming Activities

Priority: 2

Actions:

E: notify assignee of pending activity

Email Template: $activity_type: $title is due at $date_scheduled

TB Demo Data Update: Update date fields by one month each month so reports have data

Purpose: Maintenance on KB Templates. Can be deleted safely.

Runs: Monthly.

Search Filter: Demo Records

Priority: 1

Actions:

U: Update Demo Dates

Updated Fields: Date Done; Date Due

Updated Values: $date_done + 1 months; $date_scheduled + 1 months

TB: Close activity automatically (disabled)

Purpose: Automatically sets as "Done" tasks for which the scheduled day has passed.

Runs: (disabled).

Search Filter: Scheduled event passed

Priority: 3

Actions:

U: Set closing information

Updated Fields: Date Done; Status

Updated Values: $date_scheduled; Done

Workflow

The Tasks table has the following default workflow:
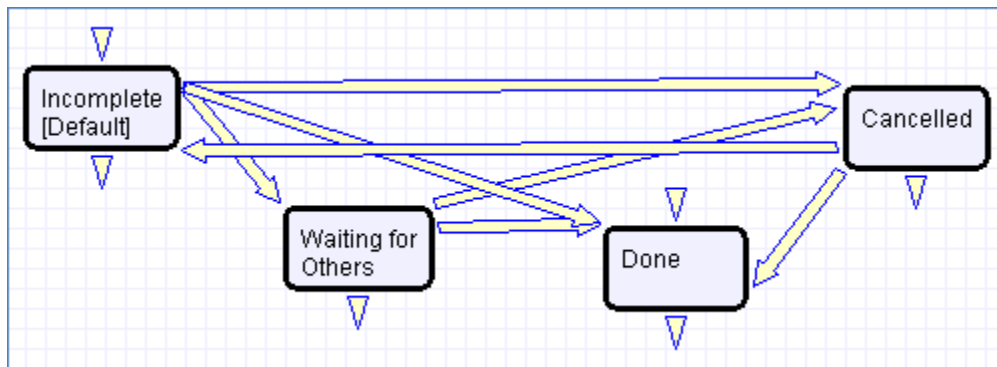
Reports

The Tasks table contains the following default Charts/Reports:
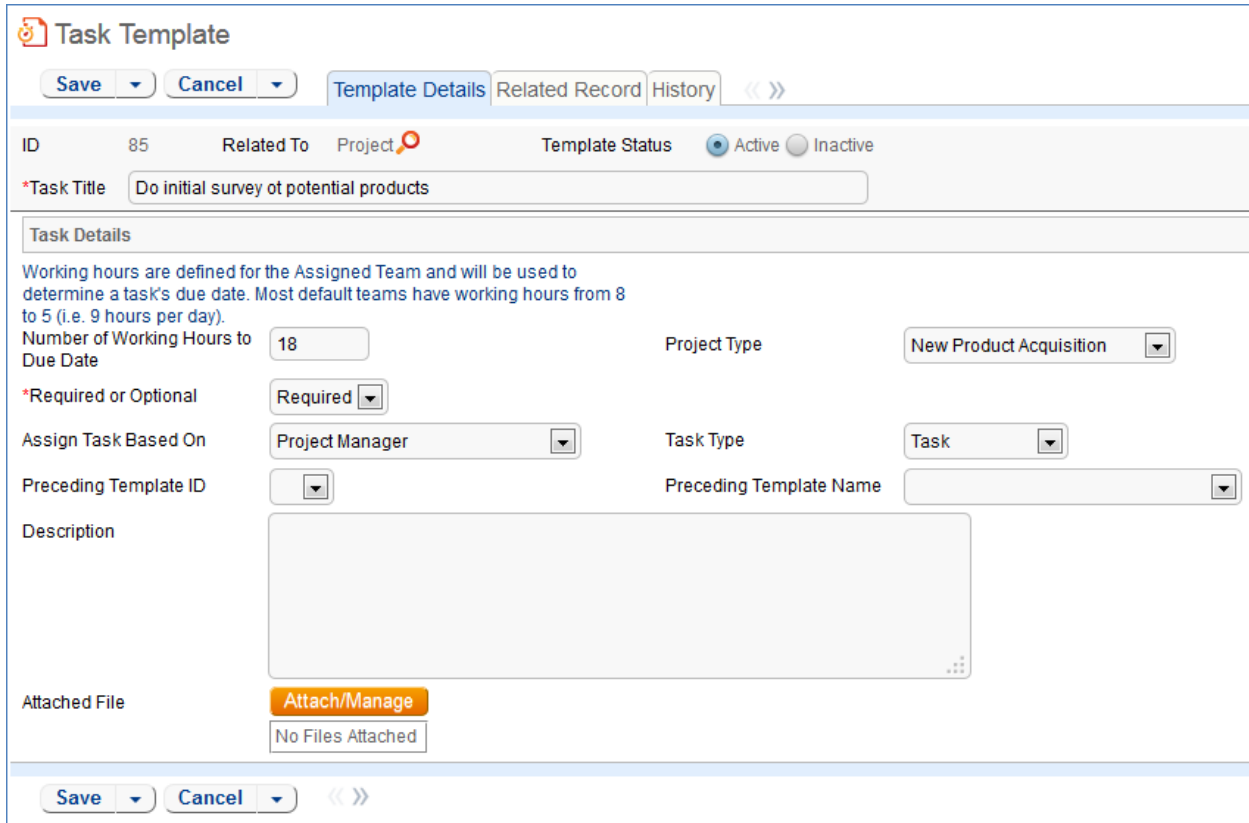
Charts/Reports

Status: 6 record(s) found, 1 pages. Click here to re-count records.

New | Copy | Delete   Views

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
☐	✎	🔍	All Tasks, segmented by assignee		Yes	Jan 12 2014 15:06	Graphical chart, HTML	Standard
☐	✎	🔍	Assignee's tasks in the past month, segmented by type		Yes	Feb 26 2014 13:44	Graphical chart	Standard
☐	✎	🔍	Done Tasks, segmented by assignee	Closed Tasks	Yes		Graphical chart	Standard
☐	✎	🔍	Open Internal Project Tasks by Assignee	Open Project Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
☐	✎	🔍	Open Tasks, segmented by assignee	Open Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
☐	✎	🔍	Tasks by Company		Yes		Graphical chart	Standard

Task Templates Table

This table holds the information necessary to generate Tasks for various other tables. It also contains automation that allows the automatic generation of Tasks for some of these tables.

Use Case

Task templates are referenced by other tables (by default only Projects and Helpdesk Cases) for the generation of tasks that occur often in the system. Automation in the generating table changes fields in a Task Template record, which prompts the Task Template table to perform a conversion between the Template record and the Tasks table. This generates a new Task with the attributes of the Template, linked to the Project or Helpdesk Case that triggered the conversion.

Figure 77. Default tab for a Task Template record.

The Related To field specifies the table for which a Task record is to be generated, and the Task Template record will hide or show choice lists (for instance, the Project Type field in the image above) pertaining to each option highlighted in Related To. Template Status is used to filter out retired or unused Task Templates from the options displayed in a Project or Helpdesk Case while retaining the Template in the system for later use. Task Title is the title inherited by any task generated by a particular template. The Required or Optional field is used primarily for the Projects table. A value of Optional means the user must manually choose to generate the task (the template will still be listed in the project for selection), while a value of Required will automatically create the task once the preceding task in the sequence is completed. Preceding Template ID and Preceding Template Name are used to design the sequence of Tasks. If left empty, the systems assumes the Task Template is a primary task, and will be launched first in the sequence. For more detail see the Projects Table or Helpdesk Cases section.

Ownership

Task Template records are owned by the user whose Login matches the Creator Login field.

Automation

Edit: Convert Template Task from helpdesk

Purpose: This handles the conversion of templates into tasks.

Runs: When created by web or API.

Search filter: R: Last HC ID Changed

Priority: 10

Actions:

C: Convert Template to New Task

Conversion: Task

Options: Silently with no confirmation

U: Add to All HC IDs

Updated Fields: All HC IDs Converted

Updated Values: $last_hc_id_text+","

Edit: Trigger Task Creation from Project

Purpose: Runs a conversion to create a Task when a Project updates the Last Project ID field.

Runs: When edited by web or API.

Search Filter: R: Last Project ID Changed and is not contained in All Project ID's Converted

Priority: 2

Actions:

C: Convert Template to New Task

Conversion: Task

Options: Silently with no confirmation

U: Append Latest Project ID Text to field All Project IDs Converted

Updated Fields: All Project IDs Converted

Updated Values: $last_project_id_text + ","

SURVEY FUNCTIONALITY

Agiloft has three special data types that can be used to create surveys or questionnaires on any subject. They work together to allow business users to create question "fields" with custom answer types and to

combine these questions into a survey type that can be inserted into a table used to collect the questions' answers.

In the Demo KB, we have set this up to be used as a simple satisfaction survey for a service desk operation. The completed surveys are held in the Surveys table. A link to the survey can be emailed to customers when their Support Case or Helpdesk Case is closed, and we have included a sample email template for this purpose. The link must be modified to form the proper URL for your system before it will work.

It is also possible to embed a set of questions in any other table. For instance, one of our customers providing technical support to its engineering customers created a list of environment questions (questions) specific to each of its products (survey type). When a customer submits a ticket, they choose a product and then answer a set of questions related to that product within the support ticket.

It is also possible to store a set of answers and then load them (so the customer can store the environment answers in their company record, and then load them into their tickets).

Surveys Table

This table is used to collect customer feedback for Support or Helpdesk cases or to send surveys on any subject to customers.

Figure 78. Sample Survey record.

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Use Case

Surveys are typically generated through a hyperlink in an email to a customer requesting their feedback.

Dear $formula($end_user_name),

Thanks for using our support system. We would appreciate hearing your feedback so that we may improve our service.

Click here to submit a survey

[Note, this link will need to be edited to replace the KB name, the URL, and any other information that changes when you create your own KB]

Figure 79. Surveys are accessed from an email hyperlink.

When the user clicks on the hyperlink, it will log them into the KnowledgeBase as a Guest and take them directly to a new Survey record, without giving them access to anything else. As part of the link, the Support Case ID or Helpdesk Case ID and Survey Type may be populated in the Survey record, linking the Survey to the case that generated the email (and to the person completing the survey).

Currently there is no rule in either the Support or Helpdesk Case tables that automatically generates a survey email. However, the email template is present in both tables.   This functionality can be enabled through an email action in a time-based or update rule. Guidance on how to manually create the hotlink URL can be found in the Hotlinks section in the Administrator Manual.

Below is a sample hotlink. This link will log the user into a new Survey record, set the Survey Type to Demo Follow-up, the Text ID field to 4, the Visitor ID field to 35675 and set the Exit URL and Cancel URL using an account with Guest permissions.

```
https://{hostname}/gui2/login.jsp?KeyID=0&kb={KBname}&user=register&password=register
&state=New:survey&field=survey_type:Demo%20Follow-
up&field=text_id:4&field=visitor_id:35675&field=hide_btn:true&gui=No/EUI&ExitURL=http
://www.agiloft.com/survey-thanks.htm&CancelURL=http://www.agiloft.com/survey-
thanks.htm
```

Automation

All Create actions

Purpose: This causes the user linked field for the Submitter in the Survey record to be set based on the support case or helpdesk case submitter.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:
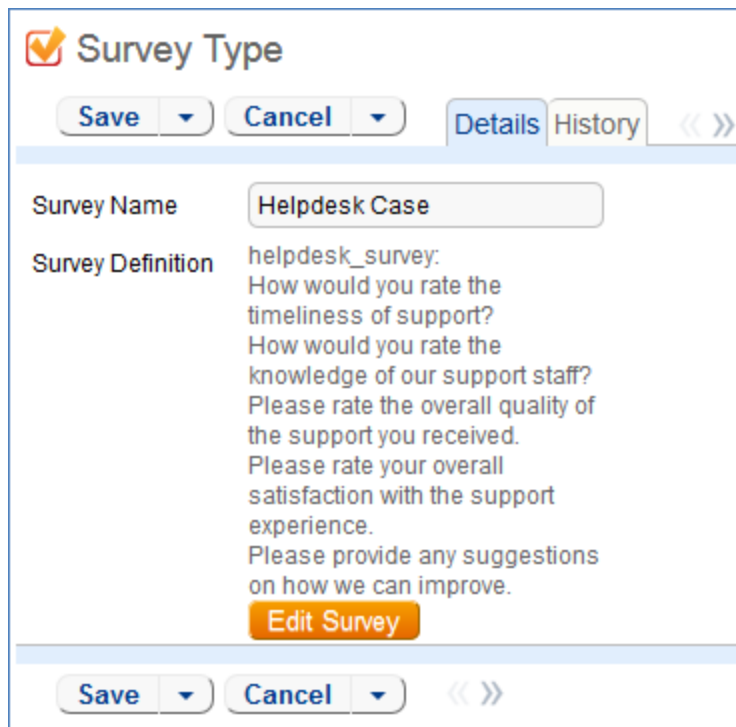
```
if (Survey Type='Support Case') {
        Set Submitter Name from Support Submitter
} else if (Survey Type='Helpdesk Case') {
        Set Submitter name from HC submitter
```

Ownership

Records in this table are owned by the customer to whom the survey email is sent, so each record is associated with a particular user from the People table.

Survey Types Table

This table contains templates that can be used to generate individual surveys.

Figure 80. Sample Survey Type record.

Use Case

The Survey Types table is a special table used in the Survey table. Records in this table display Survey Types as templates for Surveys. Each template contains a number of Survey Questions and relationships between those questions that describe whether they are required as well as any dependencies on other questions.

Ownership

Records in this table are owned by the person who submits them.

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Survey Questions Table

This table is used to generate and store the questions that are to be pulled into Survey Types.
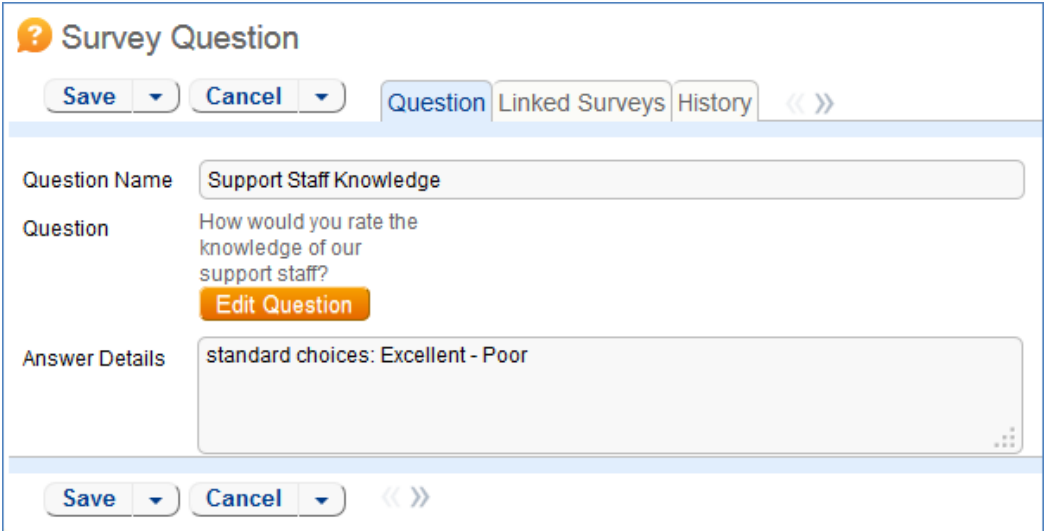
Figure 81. Sample Survey Question record.

Use Case

These records represent the pool of questions available to be made into a survey from the Survey Types table. The Edit Question button in the record opens a wizard to assist in creating the question. On the General tab, the wizard allows the text of the question itself to be defined, as well as the type of response, which can be any of the field data types used in Agiloft. Various aspects of the question's presentation can be set here as well, and the question can be named if desired. Naming the question makes it searchable, but uses more resources on the server.

Ownership

Records are owned by the user whose Login matches the Creator Login for the record.

SYSTEM TABLES

These are special purpose tables, typically accessed only by the admin. Users will rarely interact directly with system tables, if at all.

System tables are detailed below in alphabetical order.

Activity Log Table

The Activity Log table is a special table used by Agiloft administrators to monitor events such as Logins and modifications to the KnowledgeBase.

Figure 82. Sample Activity Log record.

Use Case

Activity Log records are created by the Agiloft system. No group has permission to manually create records in this table.

The Activity Log table is hidden from the left pane and only available from the Setup > Tables menu. Only the Admin group has access to the table by default; the table must first be activated by the Admin group to appear in the left pane.

The Activity Log provides a system-wide history of changes based on pre-defined criteria. By default, the system tracks all logins, all deletions, and certain admin activities that have occurred in the past month. The activity log may be configured to capture other information by creating a new Audit Rule record through the Setup > System > Configure Activity Log menu. Both the items tracked and log duration are configurable for each Activity Log configuration record.

Ownership

Records in this table are created by the system. Ownership cannot be assigned.

Reports

The Activity Log table contains the following default Chart/Reports:

All Communications Table

The All Communications table contains a record for each communication sent to or by the KnowledgeBase. Communications come in the following subtypes: Emails, Notes, Voice Calls, Faxes and Tweets. In addition to logging each communication that passes through the system, the All Communications table also allows users to send communications directly from the action bar menu.

Figure 83. The All Communications table holds all emails sent to or from the knowledgebase.

Use Case

All Communications records are created by the Agiloft system. They may also be created by members of the Admin group.

The Sent Emails subfolder contains all emails sent by the user through Agiloft. The Email Inbox subfolder contains all emails that were sent to the user and received by Agiloft.

By default Voice Calls, Faxes, and Tweets logging are turned off.

All Communications are linked to a user contact field, such as a user email address or user telephone number. If the address is used by more than one user, all users with that user address will share the same Sent Emails and Email Inbox folders. This will function like a shared email account in Outlook.

The table toolbar contains a few additional menu buttons, including Send an email, Reply, Reply to all and Forward. By default, the sent email is not associated with a data ticket, but rather with sender and receiver contacts.
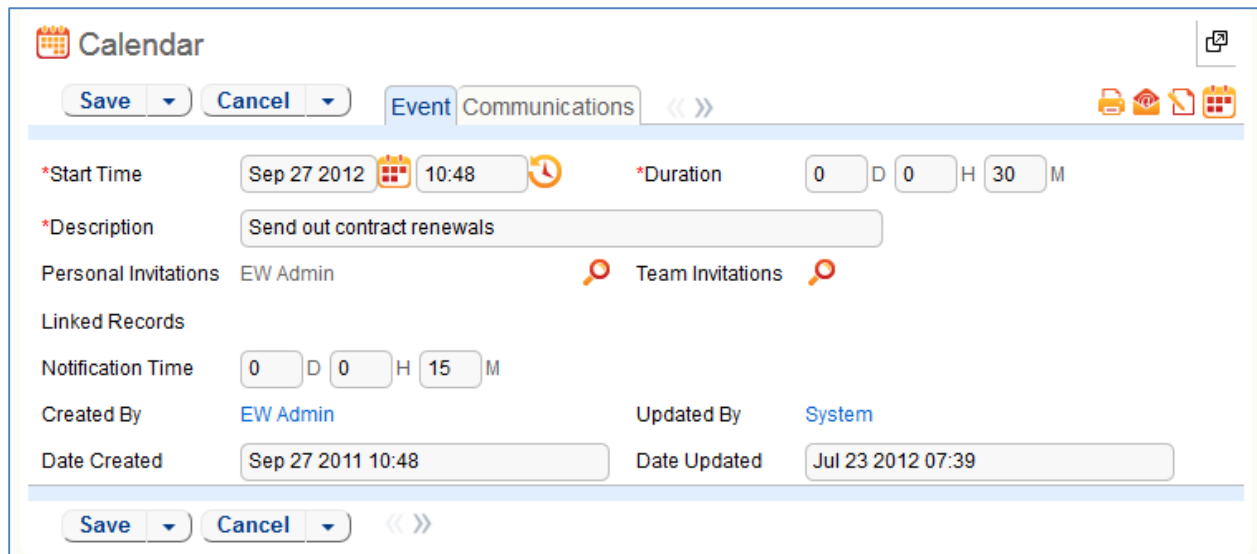
When viewing communications in this interface, users who are senders or receivers of these emails may see communications that were sent from other tables, such as a support case, a change request, users, and so on. Users can reply to or forward these emails directly from the All Communications table by using the options on the action bar.

Ownership

Records in this table are owned by the user who sends them. Specifically, a record is owned by the user whose Login matches that of the Login under the Sent From field.

Calendars Table

The Calendar table contains event records displayed in the Staff-use Calendar tool.

Figure 84. Sample Calendar record.

Use Case

New Calendar records may be created by members of the Admin, Professional Services, Support Manager, and Support Staff groups.

The Calendar table is a special table used to control events in the Calendar widget in the left pane. Records in this table are displayed as events in the Calendar widgets for the individuals and teams that they reference. By default, only members of the Admin group have direct access to this table. Other Staff Users interact with the table indirectly through their individual Calendar widgets in the Left Pane.
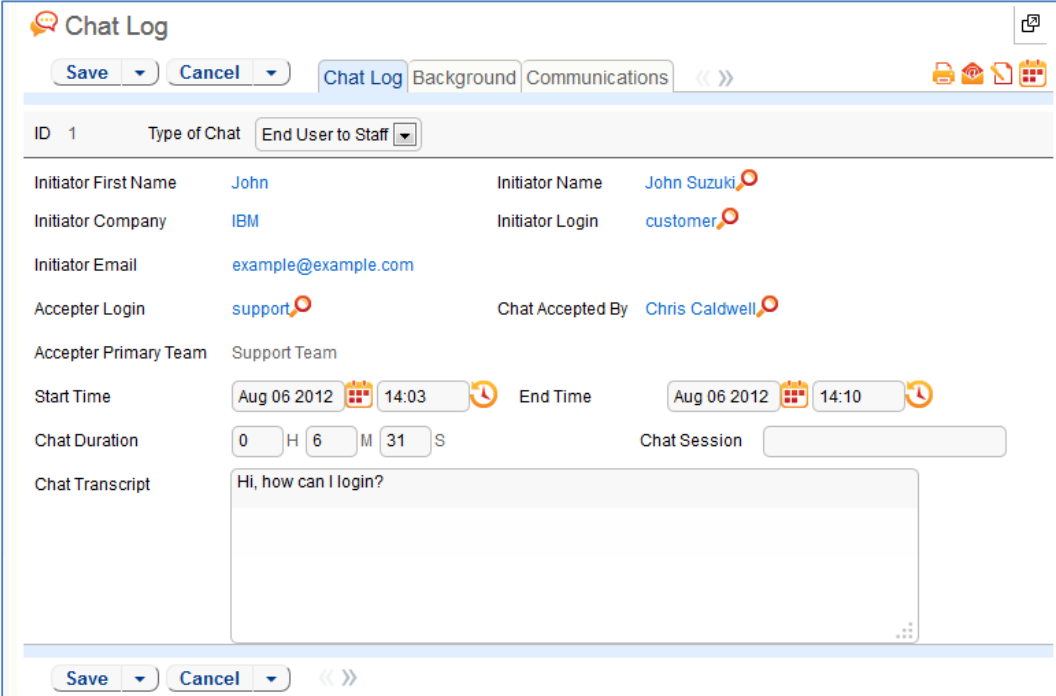
The Calendar pane is only available to staff users, and cannot be made available to end users.

Ownership

Calendar records are owned by the record's creator. Specifically, a record is owned by the user whose Login matches the Creator Login field.

Chat Log Table

The Chat Log table is a special table that can be used in conjunction with the integrated chat function to store chat information and transcripts.

Figure 85. If Chat is enabled, the Chat Log table stores chat transcripts and other information.

Use Case
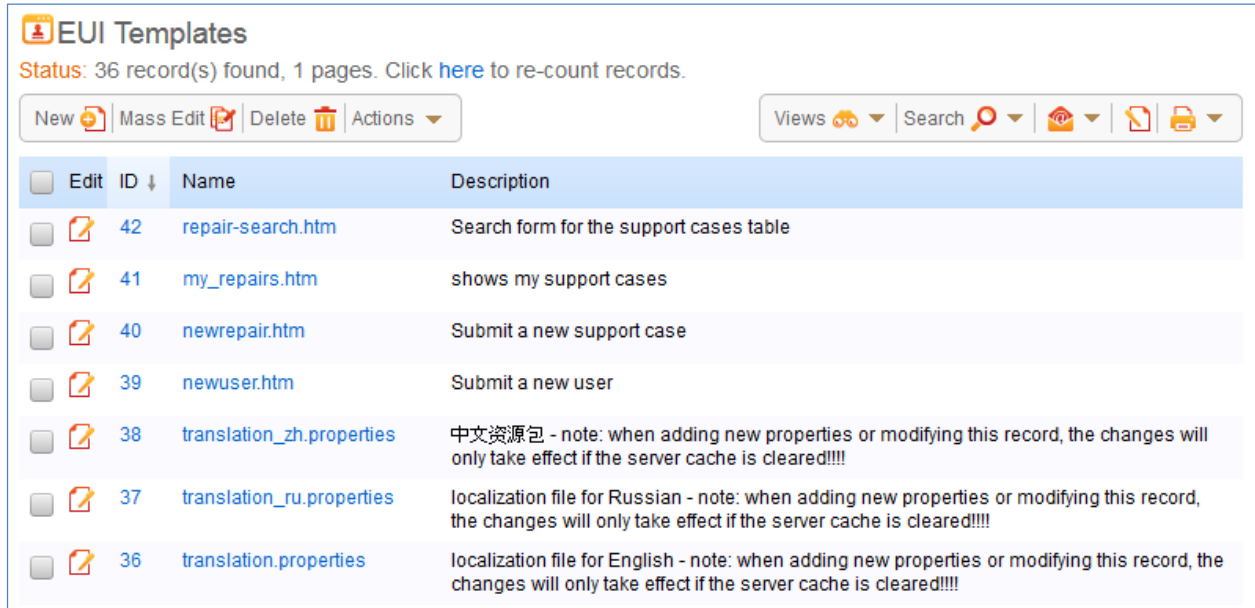
A chat transcript can be automatically saved when a user clicks the End Session button. The transcript is then saved as a record to the Chat Log table. If saving is optional, a popup will appear when the user clicks the End Session button.

Ownership

Records in this table are owned by the staff member accepting the chat session. Specifically, the record is owned by the user whose Login matches the Accepter Login field.

EUI Templates Table

This table contains the HTML files used in creating a customized End User Interface.

Figure 86. EUI Templates are HTML files used by the end user interface.

Use Case

Only members of the Admin group have full access to EUI Template records. Additionally, members of the Marketing group may create EUI Templates and edit their own.

Ownership

Records in this table are owned by the user that created them. Specifically, a record is owned by the user whose Full Name matches the Created By field.

APPENDIX A: GROUP PERMISSIONS

Staff Groups

Approvers

Table	Show Toolbar Tab	Details
All Communications	No	Can edit, view and delete own, and can view others' that satisfy search "P: Staff Record Emails and My Emails".

Table	Show Toolbar Tab	Details
Approvals	Yes	Can edit all that satisfy search "P: Approval Team is contained in User's Teams and Status is Pending" and can view all that satisfy search "P: Approval Team is contained in User's Teams".
Assets	Yes	Can view all.
Companies	Yes	Full permissions except deletion.
Contracts	Yes	Can edit records that satisfy search "P: Current Approval Team is contained in user's teams" and can view all that satisfy search "P: Current Approval Team is contained in user's teams". Can view FAQs.
Email Clicks	No	Can create. No edit or view permissions.
Email Templates	No	Full permissions.
Emails	No	Can create, and view all that satisfy search "P: Staff Record Emails and My Emails".
Employees	Yes	Can edit own and view all.
External Users	Yes	Can view all only.
Locations	No	Can view all only.
Models	No	Can view all only.
Software Apps	No	Can view all only.
Steps	No	Can view all only.
Teams	No	Can view all only.
Workflows	No	Can view all only.

Contract Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can edit, view, and delete own, and view others'.
Approval Templates	No	Can edit and view all.
Approvals	No	Full permissions except deletion.
Assets	Yes	Can view all only.
Attachments	Yes	Full permissions.

Table	Show Toolbar Tab	Details
Attachment Types	Yes	Full permissions.
Companies	Yes	Full permissions except deletion.
Contracts	Yes	Full permissions.
Contract Types	Yes	Full permissions.
Departments	No	Can view all only.
Email Templates	No	Full permissions.
Emails	No	Can view all that satisfy search "P: Staff Record Emails and My Emails".
Employees	Yes	Can view all only.
External Users	Yes	Can view all only.
Locations	No	Can view all only.
Models	No	Can view all only.
Print Templates	Yes	Full permissions.
Software Apps	No	Can view all only.
Steps	No	Can view all only.
Teams	No	Can view all only.
Workflows	No	Can view all only.

Contract Owner

Table	Show Toolbar Tab	Details
All Communications	No	Can edit, view, and delete own, and view others'.
Approval Templates	No	Can edit and view all.
Approvals	No	Full permissions except deletion.
Assets	Yes	Can view all only.
Attachments	Yes	Can create, edit own, view all, and edit others' that satisfy search "P: I am contract owner".
Attachment Types	No	Can view all only.
Companies	Yes	Full permissions except deletion.

Table	Show Toolbar Tab	Details
Contracts	Yes	Can create, edit own, view all, and edit others' that satisfy search "P: I am internal contract owner".
Contract Types	No	Can view all only.
Departments	No	Can view all only.
Email Templates	No	Full permissions.
Emails	No	Can view all that satisfy search "P: Staff Record Emails and My Emails".
Employees	Yes	Can view all only.
External Users	Yes	Can view all only.
Locations	No	Can view all only.
Models	No	Can view all only.
Print Templates	No	Can view all only.
Software Apps	No	Can view all only.
Steps	No	Can view all only.
Teams	No	Can view all only.
Workflows	No	Can view all only.

Document Reviewer

Table	Show Toolbar Tab	Details
Approvals	Yes	Can view and edit only approvals for which they are the Approver and the Status is Pending Approval. Cannot create or delete Approvals.
Documents	No	Can view all. Cannot create, edit or delete Documents.

Document Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can edit, view and delete own, can view others' that satisfy search "P: Staff Record Emails and My Emails".
Documents	Yes	Full permissions.
Email Templates	No	Full permissions.

Table	Show Toolbar Tab	Details
Emails	No	Can create and view all that satisfy search "P: Staff Record Emails and My Emails".
Employees	Yes	Can view all only.
External Users	Yes	Can view all only.
People	Yes	Can view all only.

DocuSign User

Table	Show Toolbar Tab	Details
DocuSign Envelopes	Yes	Can create, edit, view and delete only their own.
DocuSign Recipients	No	Can create, edit, view and delete only their own.
DocuSign Roles	No	Can create, edit, view and delete only their own.
DocuSign Users	No	Can create, edit, view and delete only their own.
Contracts	No	Has access to all DocuSign-related fields in Contracts (e.g. DS Files to Sign, Create DocuSign Envelope, DocuSign Envelopes and Recipients related tables)

Marketing

Table	Show Toolbar Tab	Details
All Communications	No	Can edit, view and delete own, can view others' that satisfy search "P: Staff Record Emails and My Emails".
Emails	No	Can create and view all that satisfy search "P: Staff Record Emails and My Emails".
Assets	No	Can view own. Cannot create, edit or delete.
Campaigns	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Can delete only their own.
Documents	Yes	Can create and view all. Can edit own and documents for which they are an Approver. Cannot delete.

Table	Show Toolbar Tab	Details
Email Clicks	No	Can create, edit, and view all. Can delete only their own.
EUI Templates	No	Can create and edit their own.
Helpdesk Case	Yes	Can create, edit and view own. Cannot delete.
Leads	Yes	Can create, edit, delete and view all.
Location	No	Can view all only.
Opportunity	Yes	Can create, edit own, view all, cannot delete.
Employees	Yes	Can edit own and view all. Cannot create or delete.
External Users	Yes	Can create, edit and delete own. Can view all.
Product	No	Can view all only.
Product Quoted	No	Can create, edit and delete own. Can view all.
Purchase Order	No	Can create, edit and view all. Cannot delete.
Quote	No	Can create and edit own. Can view all. Cannot delete.
Support Case	No	Can create, and edit own. Can view all. Cannot delete.
Survey	Yes	Can create and view all. Cannot edit or delete.
Task	No	Can create, edit and view all. Can delete only their own.
Team	No	Can view all only.
Time Entries	No	Can edit own and view all. Cannot create or delete.
Emails	No	Can create and view all. Cannot edit or delete.
Notes	No	Can create only.

Project Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can view all and delete only their own. Cannot create or edit.
Emails	No	Can create and view all that satisfy search "P:Staff Record Emails and My Emails". Cannot edit or delete.
Assets	Yes	Can create, edit and view all. Cannot delete.
Billing	No	Can create, edit and view all. Can delete only their own.

Table	Show Toolbar Tab	Details
Calendar	No	Can create, edit and view own. Cannot delete.
Change Requests	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Cannot delete.
Documents	Yes	Can create, edit and view all. Cannot delete.
Email Clicks	No	Can create only.
Helpdesk Case	Yes	Can create, edit and view own. Cannot delete.
Insurance Certificates	No	Can create, edit and view all. Cannot delete.
Locations	No	Can view all only.
Models	No	Can view all only.
Opportunities	Yes	Can view all only.
People	Yes	Can create, edit own. Can view all. Cannot delete.
Projects	Yes	Can create, edit all and view all. Can delete only their own.
Project Types	Yes	Can create, edit all and view all. Cannot delete.
Purchase Orders	No	Can create, edit all and view all. Cannot delete.
Software Apps	No	Can view all only.
Support Cases	No	Can create, edit own. Can view all. Cannot delete.
Surveys	Yes	Can create only.
Tasks	Yes	Can create, edit own and those that satisfy search "P: Assigned to me or my team or related to this project". Can view all. Cannot delete.
Task Templates	Yes	Can create, edit own and those that satisfy search "P: Related to contains project". Can view all. Can delete only their own.
Teams	No	Can view all only.
Time Entries	No	Can create, edit and view all. Can delete only their own.

Sales Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can delete only their own. Can view all that satisfy search "P: Staff Record Emails and My Emails".
Emails	No	Can create and view all that satisfy search 'P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own.
Assets	No	Can create, edit all and view all. Cannot delete.
Campaigns	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Can delete only their own.
Documents	No	Can create, edit their own and those that satisfy search "I can approve". Can view all. Cannot delete.
Email Clicks	No	Can create, edit, delete and view all.
Groups	No	Can view only those that satisfy search "Customer Groups". Cannot create, edit or delete.
Helpdesk Cases	No	Can create, edit and view only their own. Cannot delete.
Insurance Certificates	No	Can create, edit and view all. Can delete only their own.
Leads	Yes	Can create, edit, delete and view all.
Locations	No	Can view all only.
Opportunities	Yes	Can create, edit, delete and view all.
People	Yes	Can create, edit and view all. Can delete only their own.
Employees	Yes	Can edit only their own. Can view their own and those that satisfy search "Active Employees". Cannot create or delete.
External Users	Yes	Can create, edit and delete only their own. Can view all.
Products	Yes	Can create, edit and view all. Cannot delete.
Products Quoted	No	Can create, edit and view all. Can delete only their own.

Table	Show Toolbar Tab	Details
Projects	Yes	Can create and edit only their own. Can view all. Cannot delete.
Purchase Orders	No	Can create, edit and view all. Cannot delete.
Quotes	Yes	Can create, edit and view all. Cannot delete.
Support Cases	No	Can create and edit only their own. Can view all. Cannot delete.
Surveys	No	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create. Can edit and view their own and those that satisfy search "P: created by or assigned to me or my team". Cannot delete.
Task Templates	Yes	Can create and edit only their own. Can view all. Cannot delete.
Teams	No	Can view all only.

Sales

Table	Show Toolbar Tab	Details
All Communications	No	Can view only those that satisfy the search "P: Staff Record Emails and My Emails". Can delete only their own. Cannot create or edit.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own.
Assets	No	Can create, edit and view all. Cannot delete.
Campaigns	Yes	Can create, edit and delete only their own. Can view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Can delete only their own.
Documents	No	Can create and view all. Can edit own and only those that satisfy the search "I can approve". Cannot delete.
Email Clicks	No	Can create, edit and view all. Can delete only their own.

Table	Show Toolbar Tab	Details
Groups	No	Can view only those that satisfy the search "Customer Groups".
Helpdesk Cases	No	Can create, edit and view only their own. Cannot delete.
Insurance Certificates	No	Can create, edit and view all. Cannot delete.
Leads	Yes	Can create, edit, delete and view only their own.
Locations	No	Can view all only.
Opportunities	Yes	Can create and edit only their own. Can view all. Cannot delete.
People	Yes	Can create, edit and view all. Can delete only their own.
Employees	Yes	Can edit only their own. Can view their own and those that satisfy the search "Active Employees". Cannot create or delete.
External Users	Yes	Can create, edit and delete only their own. Can view all.
Products	No	Can view all only.
Products Quoted	No	Can create and edit only their own. Can view all. Cannot delete.
Purchase Orders	No	Can create, edit and view all. Cannot delete.
Quotes	Yes	Can create and edit only their own. Can view all. Cannot delete.
Support Cases	No	Can create and edit only their own. Can view all. Cannot delete.
Surveys	No	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create. Can edit and view their own and those that satisfy the search "P: Created by or assigned to me or my team". Cannot delete.
Teams	No	Can view only.
Time Entries	No	Can edit only their own. Can view all. Cannot create or delete.

Support Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can edit and delete only their own. Can view own and only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot create.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own. Cannot create, edit or delete.
Assets	Yes	Can create, edit, view and delete all.
Billing	No	Can create and view all. Can edit and delete only their own.
Calendars	No	Can create, edit and delete only their own. Can view only their own and those that satisfy the search "My Appointments".
Change Requests	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create and view all. Cannot edit or delete.
Companies	Yes	Can view all only.
Contracts	Yes	Can view all only.
Email Clicks	No	Can create only.
Groups	No	Can view only those that satisfy the search "P: all groups except admin".
Helpdesk Cases	Yes	Can create, edit, delete and view all.
Locations	No	Can view all only.
Models	No	Can create, edit and view all. Cannot delete.
Opportunities	No	Can view all only.
People	Yes	Can create, edit own and view all. Cannot delete.
Products	No	Can view all only.
Products Quoted	No	Can view all only.
Projects	Yes	Can create, edit own and view all. Cannot delete.
Project Types	No	Can view all only.
Purchase Orders	No	Can view all only.
Quotes	No	Can view all only.
Repair Items	Yes	Can create, edit all and view all. Cannot delete.

Table	Show Toolbar Tab	Details
Repair Requests	Yes	Can create, edit, delete and view all.
Software Apps	Yes	Can create, edit all and view all. Cannot delete.
Support Cases	Yes	Can create, edit, delete and view all.
Surveys	Yes	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create, edit own and those that satisfy the search "P: created by or assigned to me or my team or I am pm or support related". Can view all. Cannot delete.
Task Templates	Yes	Can create, edit own and those that satisfy the search "P: Related to is support case or helpdesk case". Can view all. Cannot delete.
Teams	No	Can view all only.
Time Entries	Yes	Can create, edit only those that satisfy the saved search "Done By = Name" and others. Can delete only their own. Can view all.
Workflows	No	Can create and view all. Cannot edit or delete.

Support Staff

Table	Show Toolbar Tab	Details
All Communications	No	Can edit and delete only their own. Can view own and only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot create.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own. Cannot create, edit or delete.
Assets	Yes	Can create, edit and view all. Cannot delete.
Billing	No	Can create and view all. Can edit and delete only their own.
Calendars	No	Can create, edit and delete only their own. Can view own and only those that satisfy the search "My Appointments".
Change Requests	Yes	Can create, edit and view all. Cannot delete.
Chat Logs	No	Can create and view only their own. Cannot edit or delete.

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Table	Show Toolbar Tab	Details
Companies	Yes	Can view all only.
Contracts	Yes	Can view all only.
Email Clicks	No	Can create only.
Groups	No	Can view only those that satisfy the search "P: all groups except admin"
Helpdesk Cases	Yes	Can create, edit and view all. Cannot delete.
Locations	No	Can view all only.
Models	No	Can create, edit and view all. Cannot delete.
Opportunities	No	Can view all only.
People	Yes	Can create and edit only their own. Can view all. Cannot delete.
Employees	Yes	Can create and edit only their own. Can view all. Cannot delete.
External Users	Yes	Can create, edit and view all. Cannot delete.
Products	No	Can view all only.
Products Quoted	No	Can view all only.
Projects	Yes	Can edit only their own. Can view all. Cannot create or delete.
Project Types	No	Can view all only.
Purchase Orders	No	Can view all only.
Quotes	No	Can view all only.
Repair Items	Yes	Can create, edit and view their own and only those that satisfy the search "P: repair tasks created by or assigned to me or my team". Cannot delete.
Repair Requests	Yes	Can create, edit and view all. Cannot delete.
Software Apps	Yes	Can create, edit and view all. Cannot delete.
Support Cases	Yes	Can create, edit and view all. Cannot delete.
Surveys	No	Can create only.
Tasks	Yes	Can create. Can edit only their own and those that satisfy the search "P: created by or assigned to me or my team". Can view only their own and those that satisfy the search "P: assigned to me or related to helpdesk or support case or project". Cannot delete.
Task Templates	No	Can view all only.

Table	Show Toolbar Tab	Details
Time Entries	No	Can create and view all. Can delete only their own. Can edit only those that satisfy the search "Done By = Name".

End User Groups

Contract Creator

Table	Show Toolbar Tab	Details
Contracts	No	Can create, edit own, and view all
Contract Types	No	Can view all only.
Attachments	No	Can create, edit own, and view all
Attachment Types	No	Can view all only.

Customer Manager

Table	Show Toolbar Tab	Details
All Communications	No	Can view only their own.
Emails	No	Can create, view only those that satisfy the search "To or From Me".
Activity Logs	No	Can view only their own.
Assets	No	Can view only their own.
Chat Logs	No	Can create, edit and delete own. Can view all.
Companies	Yes	Can view own and only those that satisfy the search "My Company".
Documents	No	Can view only those that satisfy the search "Public Access".
Email Clicks	No	Can create only.
People	Yes	Can create, edit, delete and view only their own.
Support Cases	No	Can create and edit own. Can view own and only those that satisfy the search "My Company Cases".
Surveys	No	Can create only.

Customer

Table	Show Toolbar Tab	Details
All Communications	No	Can view only those that satisfy the search "To or From Me".
Emails	No	Can create and view only those that satisfy the search "To or From Me".
Activity Logs	No	Can view only their own.
Chat Logs	No	Can create, edit and delete own. Can view all.
Documents	No	Can view only those that satisfy the search "Public Access".
Email Clicks	No	Can create only.
People	Yes	Can view only their own.
Support Cases	Yes	Can create, edit and view only their own. Cannot delete.
Surveys	No	Can create only.

Document Creator

Table	Show Toolbar Tab	Details
Emails	No	Can create only.
Approvals	No	Can view all only.
Documents	Yes	Can create, edit, delete and view only their own.
Email Clicks	No	Can create only.
People	No	Can view only their own.

Guest

Table	Show Toolbar Tab	Details
Emails	No	Can create and view only those that satisfy the search "To or From Me".
Activity Logs	No	Can view only their own.
Chat Logs	No	Can create, edit and delete own. Can view all.

Table	Show Toolbar Tab	Details
Email Clicks	No	Can create only.
Leads	No	Can create only.
People	Yes	Can create only.
Support Cases	No	Can create only.
Surveys	No	Can create only.

Internal Customer

Table	Show Toolbar Tab	Details
Emails	No	Can create, and view only those that satisfy the search "To or From Me".
Activity Logs	No	Can view only their own.
Assets	No	Can view only their own.
Chat Logs	No	Can create, edit and delete own. Can view all.
Documents	No	Can view only those satisfy the search "Public and Internal Access".
Email Clicks	No	Can create only.
Helpdesk Cases	Yes	Can create, edit and view only their own.
Models	No	Can view all only.
Software Apps	No	Can view all only.
Surveys	No	Can create only.

Repair Customer

Table	Show Toolbar Tab	Details
All Communications	No	View only those that satisfy the saved search "To or From Me".
Emails	No	Can create and view only those that satisfy the saved search "To or From Me".
Activity Logs	No	Can view only their own.
Chat Logs	No	Can create, edit, delete and view all.

Table	Show Toolbar Tab	Details
Documents	No	Can view only those that satisfy the saved search "Public Access".
Email Clicks	No	Can create only.
People	Yes	Can view only their own.
Repair Requests	Yes	Can create, edit and view only their own.
Support Cases	Yes	Can create, edit and view only their own.
Surveys	No	Can create only.

Selfregistered User

Table	Show Toolbar Tab	Details
Emails	No	Can create and view only those that satisfy the saved search "To or From Me".
Activity Logs	No	Can view only their own.
Chat Logs	No	Can create, edit, delete and view all.
Email Clicks	No	Can create only.
People	Yes	Can edit and view their own.
Support Cases	No	Can create, edit and view their own. Can view FAQs.
Surveys	Yes	Can create only.