



CRM/BPM Demo KB Documentation

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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

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 the [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 – which tables and tabs they see, the records and fields they see, the records they can create and edit, and the available menu actions—depend on group membership. 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.

The user's **primary team** determines their look and feel scheme—so customers on different teams can see 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.

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.
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 to manage campaigns and leads.

Group	Type	General description of roles and access permissions
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.

Teams	Description
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.
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.

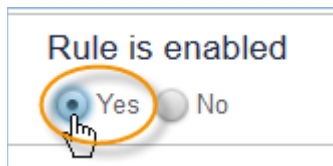
Import/Export

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.

Rules

The **Setup > Rules** menu shows default and custom business rules from every table. Rules which run on a time-based schedule are prefixed "TB." Without a paid license, time-based rules can only run once every 48 hours.

All time-based rules are disabled by default in the CRM/BPM Knowledgebase template. To enable time-based rules, go to **Setup > Rules**. Click the **Edit** icon next to the TB rule you want to enable. On the **General** tab of the rule dialog, scroll down to select **Yes** under **Rule is enabled**.



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. Select End User to log in to the customizable EUI.

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 Employees, External Users Subtables

The two subtables (Employees and External Users) of the people table 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,” “user,” 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.

In a support context, users may be allowed to self-register (create records) using the limited-access “register” account. Records created by the login “register” are added to the Selfregistered User group.

They can then be vetted by staff and moved into the official Customer group. This works in conjunction with a self-registration hyperlink at your website.

To view FAQs and submit support issues or sales questions, [create your own user account](#).

Figure 2. A hyperlink using the login "register" lets end users self-register.

There are two subtypes of People records: Employees and External Users. We recommend that all individuals be stored in the system as an Employee or an External User, even people who will not be able to access the system as a user.

The External Users subtable 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 subtable holds information about company employees, like home address and working hours, which the External Users table does not. LDAP or Active Directory authentication can be used to create and update users in the Employees subtable.

By default, People records also include [embedded tables](#) showing all of a user's Support Cases and related records from other tables.

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

Ownership

Records in this table are owned by an individual.

People records not associated with either subtable 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.

Automation

Note: The following rules are enabled on the Employee subtable:

Edit: Approval Record Creation

Purpose: This rule handles conversion of Employee records into Approvals when a new document approval is needed.

Runs: When edited by web or API.

Search Filter: R: Last Doc ID Text Changed and All Docs does not contain Last Doc ID

Priority: 1

Actions:

C: Convert Employee to New Approval

Conversion: Approval

Options: Silently with no confirmation

U: *Add to All Document IDs Converted*

Updated Field: All Document IDs Converted

Updated Value: \$last_document_id_text+"," (formula)

Note: *The following rules are enabled on the External User subtable:*

Create/Edit: Contract Source Actions (API)

Purpose: This rule runs on external users who are created from within a contract using the button to **Create Main Contact**. It runs if the **Contract Source ID** has a value when the record is created or if the **Contract Source ID** field changes because an existing user is linked to a new contract.

Runs: When created or edited by web or API.

Search Filter: R: Contract Source ID changed and is not empty

Priority: 1

Actions:

L: *Set Main Contact ID in source Contract*

Chain: External User → Contract through field: **Contract Source ID**

Summary: This action updates the **Party Main Contact ID** in a source contract, creating the link to the new person within the contract.

U: *Set Main contact ID in source Contract*

Updated Field: Party Main Contact ID

Updated Value: \$contacts.id (formula)

Create: Set External User Info if Login is Empty (email, web, API)

Purpose: This rule runs when a new external user is created but the **Login** is blank. Its purpose is to speed the creation of user records by setting a **Login** and **Password**, so the person can be recognized as a system user if they replay to a system-generated email. It then clears the **Primary Team** so the user will not be able to log in.

The user's email address is used for the **Login** if possible; else the **ID** is used as the **Login**. A generic **Password** is set based on the record **ID**.

If you want the new user to be able to log in, it is recommended to manually set up a **Login** and **Password**, then choose the appropriate **Group** and **Team**.

Runs: When created by email, web, or API.

Search Filter: R: Login is Empty

Priority: 11

Actions:

I: Set Login, Password, Groups, and Teams

```
if (Email=NULL) {  
    Set Login to Email  
} else {  
    Set Login to ID  
}  
Set Password to changeme + id  
Blank out Primary Team
```

Create: Selfregistering user group set

Purpose: This rule facilitates user self-registration via a hyperlink at your website. When users self-register, their **Group** membership is set to the Selfregistered User group, so they can be confirmed by staff before adding them to the Customer group.

Runs: When created by email, web, or API.

Search Filter: Selfregistered user



Priority: 1

Actions:

U: Set Group to selfregistered

Updated Field: Groups




Updated Value: Selfregistered User




Reports








The People 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    

<input type="checkbox"/> Edit View	Title ↑	Published	Filter
<input type="checkbox"/>  	Contacts and End Users Phone List by Company	No	All Non-Employees sorted by company and
<input type="checkbox"/>  	Contacts and End Users Phone List by Last Name	No	C: all non-employees sorted by last name
<input type="checkbox"/>  	Contacts Pie Chart by Type of Contact	Yes	
<input type="checkbox"/>  	Employee Phone List by Last Name	Yes	Active Employees
<input type="checkbox"/>  	Employees Segmented by Department	Yes	Active Employees
<input type="checkbox"/>  	End Users grouped by Company	No	C: All end users sorted by company

Companies Table

The Companies table is used to store information for companies in the system. This typically includes the [Company Name](#), address, additional contact information, and the company's [Primary Role](#) (e.g., Partner, Vendor, or Manufacturer).

Company

Save ▼
Cancel ▼
Key Info
Locations and Contacts
Sales Info
Account Info
Related Information
Emails
History

ID	1	*Status	Active ▼
*Company Name	<input type="text" value="Agiloft"/>	Parent Company	<input type="text" value=""/> 🔍

Key Company Information

*Primary Role	Internal ▼	Company Roles	<input type="checkbox"/> Customer <input type="checkbox"/> Internal <input type="checkbox"/> Manufacturer <input type="checkbox"/> Media <input checked="" type="checkbox"/> Partner <input type="checkbox"/> Prospect <input checked="" type="checkbox"/> Vendor <input type="checkbox"/> Other
Telephone	<input type="text" value="650-587-8615"/> Ext. <input type="text" value="1"/>	Fax	<input type="text" value="650-745-1209"/>
Public Company	<input type="text" value="Choose one"/> ▼	Annual Revenue	\$ <input type="text" value=""/>
Company Website	<input type="text" value="www.agiloft.com"/>		
Ongoing Notes			

Account Rep Information

Account Rep	<input type="text" value=""/> 🔍	Primary Team
Rep Email		Rep Phone

Save ▼
Cancel ▼
⏪ ⏩

Figure 3. Sample Company record.

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 be created by conversion from the Leads table once they become customers. For contract management users, companies can be created with an **action button** when filling out a new Contract record.

Company address information is stored in the Locations background table and displayed on the **Locations and Contacts** tab. A parent company may have several locations, e.g., a billing office, branch locations, and headquarters.

Company Locations							
Status: 3 record(s) found, 1 pages. Click here to re-count records.							
New Unlink Views ▼							
<input type="checkbox"/> Edit	ID ↓	Location Name	Location Type	Street Address 1	City	State / Province	Telephone
<input type="checkbox"/>	160	Agiloft Billing	Billing	1381 Parker Rd	Santa Clara	CA	
<input type="checkbox"/>	54	Charlotte Branch	Branch, Shipping	3819 Cardigan Lane	Charlotte	NC	
<input type="checkbox"/>	7	Redwood City	Headquarters	460 Seaport Court	Redwood City	CA	
Main Location		Charlotte Branch ▼					

Figure 4. Companies may have several locations, shown on the Locations and Contacts tab.

As a background table, many other tables link to the information stored in the Companies table. The **Related Records** tab shows related tables for Support Cases, Contracts, Insurance Certificates, and Assets.

New Insurance Certificates are typically added from the Company record. An **Insurance Certificate Owner** is defined just above the **Insurance Certificates** related table. The **Insurance Certificate Owner** is notified fourteen days before one or more certificates is due to expire, provided that there is at least one active or pending contract. In the certificate record, the **Main Contact** is the primary contact at the vendor company.

Insurance Certificates							
Insurance Certificate Owner		Maurice Sendak		Insurance Cert Owner Email		example26@example.com	
Insurance Certificates							
Status: 1 record(s) found, 1 pages. Click here to re-count records.							
New Mass Edit Delete Unlink Actions ▼				Views ▼ Search ▼ ▼			
<input type="checkbox"/> Edit	ID ↓	Type of Certificate	For Company Name	Status	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/>	14	Excess Liability	Acme Micro	Valid	\$35,500.00	May 27 2016	
No. of Active Insurance Certificates		1					

Figure 5. Track insurance certificates on the Related Records tab.

Insurance certificates added to a company record are automatically linked to all contracts associated with the vendor company. See the [INSURANCE CERTIFICATES TABLE](#) for more information.

Ownership

Records in this table are owned by the [Account Rep](#). Specifically, Company records are owned by the user whose [Full Name](#) matches the [Account Rep](#) field. By default, the [Account Rep](#) is the user who created the Company record.

Automation

The Companies table contains the following business rules:

Create/Edit: Contract Source Actions (API)

Purpose: This rule runs when a new company is created from within a contract. Its purpose is to update the [Company Roles](#) field to match the Primary Role in the company record and to link the new company back into the contract by setting the [Company ID](#) in the source contract.

Runs: When created or edited by API only.

Search Filter: R: Contract Source ID changed and is not empty

Priority: 1

Action:

L: Set Company ID in source Contract

Summary: This action updates the Company ID in a source contract record, creating a link to the company within the contract.

Chain: Companies → Contracts via field: [Contract Source ID](#).

U: Set Company ID in source Contract0

Updated Field: Company ID

Updated Value: \$company.id (formula)

U: Set Company Roles

Notes: This sets the multi-value [Company Roles](#) field by copying the value from the [Primary Role](#) field.

Updated Field: Company Roles

Updated Value: \$type_of_company

TB: Notify about expiring insurance certificates (disabled)

Purpose: This rule sends email notifications to the Insurance Certificate Owner about upcoming expirations dates for insurance certificates.

Runs: Daily at 3 AM.

Search Filter: R: Expiring certificates in 14 days and active/in progress contracts

Priority: 11

Action:

E: Email Insur Cert Owner of 14 days expiring certs

Sent To: User in the [Insurance Certificate Owner](#) field

Template Name: Email insur cert owner of 14 day expiring certs

Summary: Reminds the [Insurance Certificate Owner](#) of the impending expiration date of an insurance certificate.

Reports

The Companies 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

<input type="checkbox"/> Edit View	Title ↑	Published	Filter
<input type="checkbox"/>	Companies by Sales Rep	No	C:Customer and Prospect Companies
<input type="checkbox"/>	Companies Segmented by Country	Yes	All Companies Alphabetical
<input type="checkbox"/>	Companies Segmented by Industry	Yes	All Companies Alphabetical
<input type="checkbox"/>	Companies Segmented by Region	Yes	All Companies Alphabetical
<input type="checkbox"/>	Company pie chart by Primary Role	No	
<input type="checkbox"/>	Customer Companies alphabetical	No	C: Primary Role is Customer

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.

The screenshot shows a web-based form for creating or editing a location. At the top, there's a title 'Location' with a building icon. Below the title are navigation tabs: 'Save', 'Cancel', 'Location Details' (active), 'Contacts', 'Emails', and 'History'. The form fields are as follows:

- ID: 1
- Company Name: Adobe (with a magnifying glass icon)
- Primary Role: Manufacturer (dropdown menu)
- *Location Name: Adobe West Coast
- *Location Type: Campus (with a magnifying glass icon)
- Street Address: 1234 West Main Street (with a magnifying glass icon)
- City: Carlsbad
- Country: USA (dropdown menu)
- Zip or Postal Code: 95424
- US State: CA (dropdown menu)
- Telephone: 430-323-8088 (with an 'Ext.' field)
- Fax: 434-656-9878

At the bottom of the form, there are buttons for 'Map It' and 'Find Local Hotels', and a final set of 'Save', 'Cancel', and navigation arrows.

Use Case

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

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](#).

Location records are created by [conversion](#) at certain points:

- When a new company is created from within a contract, a location is created in the background.
- When a lead is converted to an opportunity record, a location is created.

Ownership

Location 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

The following rules are set up on the Locations table:

Create: On Creation Actions

Purpose: This rule fills out comma and block formatted address fields with the values from the new location address.

Runs: When created by web or API.

Search Filter: None

Priority: 3

Action:

I: All Creation Actions by Web/API

```
if (Street Address 2=NULL) {  
    Set address fields for no street address 2  
} else {  
    Set address fields with 2 address lines  
}
```

Create/Edit: Contract Source Actions (API)

Purpose: This rule sets the [Location ID](#) in the linked contract and [Main Location ID](#) in the linked Company when the [Contract Source ID](#) changes.

Runs: When created or edited by API only.

Search Filter: R: Contract Source ID changed

Priority: 1

Action:

L: Set Location ID in source Contract

Chain: Location → Contract through field: [Contract Source ID](#)

U: Set Location ID in source Contract0

Updated Field: Location ID

Updated Value: \$locations.id (formula)

L: Set Main Location ID in linked Company

Chain: Location → Company through field: [Company ID](#)

U: Set Main Location ID in linked Company

Updated Field: Main Location ID

Updated Value: \$locations.id (formula)

Edit: handle address update if it changes

Purpose: This rule resets the comma and block formatted address fields if the primary street address fields have changed.

Runs: When created or edited by web only.

Search Filter: R: Street address fields changed last modification

Priority: 11

Action:

I: Set Address fields

```
if (Street Address 2=NULL) {  
    Set address fields for no street address 2  
} else {  
    Set address fields with 2 address lines  
}
```

Create: Copy state/province to new fields

Purpose: This rule sets the *State / Province* field for U.S. and non-U.S. addresses in location records.

Runs: When created or edited by web or API.

Search Filter: None

Priority: 2

Action:

I: Set State province

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

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.

The screenshot shows a 'Support Case' record with the following details:

- ID:** 406
- Status:** Open
- Assigned Team:** Support Manager Team
- Assigned Person:** Ralph Knowles
- Contact Information:**
 - *Customer Name: Weston Presley
 - Customer Phone: 123-444-4444
 - *Customer Email: example41@acme.com
 - User Company: Acme Micro
 - Cell Phone: (empty)
 - Customer Login: (empty)
- Supported User:** (empty)
- Problem Description:**
 - Type of Issue: Question
 - Priority: Critical
 - *Summary: SQL Server query
 - Problem Description: Hi support, I have a query regarding the application of a SQL Server 2008 SP2. We are considering applying that to our server which has EW installed at present. Is there any known issues in doing this?
- Inbound Attachments:** Attach/Manage, No Files Attached

Figure 6. Sample Support Case record.

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 from the user record. If the user record does not contain a value in the [Customer Name](#) or [Customer Email](#) fields, the customer is 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 are 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. When internal staff users create a case, they can assign it directly to an individual, or a team other than the Support Team, and can set the 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 but needs more information from the customer, the technician can set the [Status](#) to Sent to Customer. Changing the status automatically sends an email to the customer requesting further information and includes the content of the [Additional Notes](#) field, an append-only field used to communicate with the customer. The email includes a hyperlink the customer can click to log in and 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 technicians need to reassign the case to someone else, they can change the [Assigned Person](#) field to that person's name and the system emails the new assignee notifying them of the reassignment.

The [Staff Only Notes](#) field holds working notes that should not be visible to the customer.

To update the customer on progress, staff members can type notes into the [Additional Notes](#) field. A rule will automatically send anything typed into the [Additional Notes](#) field as a message to the customer.

When the case is completed, the technician 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 sends the customer a hyperlink 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 hyperlink 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](#).

SLAs and Time Tracking

SLA compliance is built in to the Support Case table. On the [Time](#) tab, details about the applicable SLA are shown under the [SLA Dates](#) heading. The [SLA Title](#), [Working Hours to Complete](#), and [Working Hours to Warning Notification](#) are set by a rule that finds the right SLA based on matching the [Priority](#) and [Type of Issue](#) fields. The rule also sets the fields [SLA Due Date](#) and [SLA Warning Notification Date](#), which are used as triggers for email notifications to technicians. Users typically do not interact with these fields in the Support Case table.

If the [Priority](#) or the [Type of Issue](#) change after the case is created, another rule updates the SLA fields with the appropriate new values.

To alert users of approaching due dates, additional rule actions set the font color in the [table view](#) to red for records whose [SLA Warning Notification Date](#) has passed.

When the support case [Status](#) changes to Closed, the [Date Closed](#) is compared to the [SLA Due Date](#) to determine whether or not the SLA was met. If the SLA was met, the [Met SLA](#) field is set to 1 and [Closed within SLA](#) is set to Yes. Otherwise, [Met SLA](#) is set to 0 and [Closed within SLA](#) is set to No.

Reporting on SLA success rates is best done on the numerical [Met SLA](#) field.

The screenshot shows the 'Support Case' interface with the 'Time' tab selected. The case ID is 418 and the status is 'Open'. The assigned team is 'Support Team'. The SLA Due Date is 'Apr 06 2015 17:00' and the SLA Warning Notification Date is 'Apr 06 2015 16:00'. The Working Hours To Complete is '9 hours 00 minutes' and the Working Hours To Warning Notification is '8 hours 00 minutes'. The SLA ID is '10' and the SLA Title is 'High priority questions for support cases'.

SLA Dates			
SLA Due Date	Apr 06 2015 17:00	SLA Warning Notification Date	Apr 06 2015 16:00
Working Hours To Complete	9 hours 00 minutes	Working Hours To Warning Notification	8 hours 00 minutes
SLA ID	10	SLA Title	High priority questions for support cases

Figure 7. SLA tracking on the Time tab lets technicians know when an SLA is not met.

You can configure the specific SLA settings by modifying records in the [SLA TABLE](#).

Time tracking is enabled and integrated with the Time Entry table. On the [Working](#) tab, staff can enter the time they spent into the [Time Spent](#) field and a description into the [Time Description](#) field while editing a support case. Then, click the [Add Time](#) button to automatically create a Time Entry record associated with the case.

Figure 8. Staff can enter time spent on the Working tab.

All time related records are shown on the **Time** tab in the support case, along with a running total of time spent. Reporting on time spent is done from 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.

Ownership

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

Automation

Create: New support case actions

Purpose: This handles all creation actions for Support Cases, including email notifications and setting SLA dates and row coloring.

Runs: When created by web, email or API.

Search filter: None.

Priority: 1

Actions:

I: New Support Case actions

```
if (Priority!=NULL and Type of Issue!=NULL) {  
    Set SLA based on priority and issue  
    Set SLA Dates  
}  
if (Assigned Person!=NULL) {  
    Email assignee about new case  
} else if (Assigned Team!=NULL) {  
    Email Assigned team new case  
}
```

Edit: All customer update actions no api

Purpose: This handles all notifications and **Status** updates actions when editing a Support Case as an end user. It also updates SLA fields and row coloring if needed, based on a change to the priority or status.

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  
    Set Alert Color to Default  
}  
if (Status='Sent to Customer') {  
    Set State to Updated by Customer  
}  
if ((Priority changed from: any value to: any value last user's modification or Type of Issue changed from: any value to: any value last user's  
modification) and Status!='Closed') {  
    Set SLA based on priority and issue  
    Set SLA Dates  
}  
if (Assigned Person!=NULL) {  
    Email assignee about an update  
} else {  
    Email Assigned Team of Customer Update  
}  
if (Status changed from: any value to: 'Closed' last user's modification) {  
    Set Alert Color to Grey  
    if (SLA Due Date>=$date_closed) {  
        Set Closed within SLA to yes and Met SLA to 1  
    } else {  
        Set Closed within SLA to no and Met SLA to 0  
    }  
}
```

Edit: All edit actions done by staff users

Purpose: This handles all notifications when editing a Support Case as a staff user, as well as setting SLA notification dates and row alert colors.

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!='$_1903_full_name') {  
    Email assignee when case is reassigned to him  
}  
if (Additional Notes changed from: any value to: any value last user's modification and Status not changed last user's  
modification) {  
    Email customer updated additional notes  
}  
if ((Priority changed from: any value to: any value last user's modification or Type of Issue changed from: any value to: any  
value last user's modification) and Status!='Closed') {  
    Set SLA based on priority and issue  
    Set SLA Dates  
}  
if (Status changed from: any value to: 'Closed' last user's modification) {  
    Set Alert Color to Grey  
    if (Date Closed<'$sla_due_date') {  
        Set Closed within SLA to yes and Met SLA to 1  
    } else {  
        Set Closed within SLA to no and Met SLA to 0  
    }  
}  
} else if (Status changed from: 'Closed' to: 'Reopened' last user's modification) {  
    Set Alert Color to Default  
}  
}
```

Edit by API: Handle changes to SLA notification and due dates

Purpose: This handles email notifications and row coloring for support cases with SLAs when the SLA date values change.

Runs: When edited by Web or API.

Search filter: R: SLA Due date or notification date just changed and not closed

Priority: 2

Actions:

I: Notify Assignee if SLA dates are in the past

```
if (SLA Due Date<this minute) {
    Email assigned team and person that SLA Due date has passed
} else if (SLA Warning Notification Date<this minute) {
    if (Assigned Person!=NULL) {
        Email assigned person of upcoming due date
    } else {
        Email team of upcoming due date
    }
}
if (SLA Warning Notification Date changed from: any value to: any value during record's last modification and Status!='Closed'
and (SLA Warning Notification Date<=10 minute in the future or SLA Warning Notification Date<=this minute)) {
    if (Assigned Person!=NULL) {
        Email assigned person of upcoming due date
    } else {
        Email team of upcoming due date
    }
    Set Alert Color to Red
} else if (SLA Warning Notification Date changed from: any value to: any value during record's last modification and Alert
Color='Red' and SLA Warning Notification Date>10 minute in the future) {
    Set Alert Color to Default
}
```

TB: Daily check for SLA reminder and due date – send email as appropriate – disabled

Purpose: This handles notifications and row coloring changes for support cases whose SLA warning or due date has arrived.

Runs: Every 10 minutes (disabled).

Search filter: R: SLA Due or warning date is less than 10 minutes in future and not closed.

Priority: 12

Actions:

I: Notify of arrived due date or warning date

Notes: Notify the assigned team or person of open cases within 10 minutes of the warning date or right after the due date has passed.

```
if (SLA Warning Notification Date<=10 minute in the future) {
    if (Assigned Person!=NULL) {
        Email assigned person of upcoming due date
    } else {
        Email team of upcoming due date
    }
} else if (SLA Due Date<=10 minute old) {
    Email assigned team and person that SLA Due date has passed
}
```

U: Set Alert Color to Red

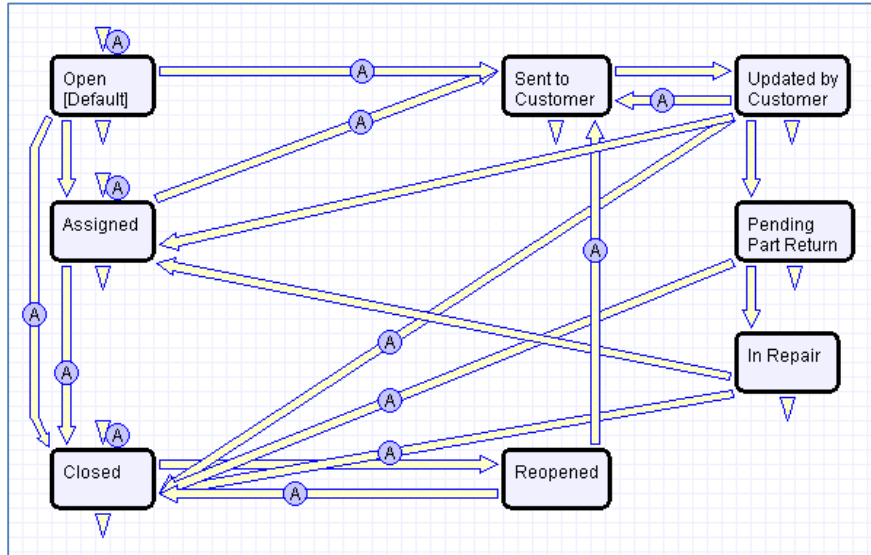
Purpose: Change alert color to red based on approaching SLA due date.

Updated Field: Alert Color

Updated Value: Red

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: 23 record(s) found, 1 pages. Click here to re-count records.							
New  Copy  Delete 			Views   				
<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>				Yes	Nov 29 2010 16:30	Graphical chart, HTML	Standard
<input type="checkbox"/>				Yes	Jul 05 2010 15:28	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>				Yes	Jul 05 2010 14:53	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>				Yes	Jul 05 2010 14:50	Graphical chart	Standard
<input type="checkbox"/>			All Closed Cases	No	Feb 16 2011 17:47	Graphical chart, HTML	Standard
<input type="checkbox"/>			C: Date Closed in Past Year	Yes	Jul 02 2013 10:15	Graphical chart, HTML	Standard
<input type="checkbox"/>				Yes	Feb 16 2011 17:44	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			C: Date Closed in Past Year	Yes	Feb 16 2011 17:47	Graphical chart, HTML	Standard
<input type="checkbox"/>			Closed Cases	No	Jun 12 2015 16:47	Graphical chart, HTML	Standard
<input type="checkbox"/>			Closed Cases	Yes	Jun 12 2015 16:03	Graphical chart, HTML	Standard
<input type="checkbox"/>			Closed Cases	Yes	Jun 12 2015 16:48	Graphical chart, HTML	Standard
<input type="checkbox"/>			Not Closed	Yes	Feb 16 2011 17:43	Graphical chart	Standard
<input type="checkbox"/>			My Assigned Support Cases	Yes	Feb 16 2011 17:45	Graphical chart, HTML	Standard
<input type="checkbox"/>			All Closed Cases	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			C: Date Closed in Past Year	No	Apr 17 2012 17:03	Graphical chart, HTML	Standard
<input type="checkbox"/>			C: Date Created in past year	Yes	Jul 05 2010 15:40	Graphical chart, HTML	Standard
<input type="checkbox"/>				Yes	Mar 23 2012 11:49	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			Created in past month	Yes	Jul 05 2010 15:53	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>			Not Closed	No	Jan 25 2011 12:52	Graphical chart, HTML	Standard
<input type="checkbox"/>				Yes	Feb 16 2011 17:33	HTML	Custom Summary
<input type="checkbox"/>			All Closed Cases	No	May 01 2015 15:33	Graphical chart	Standard
<input type="checkbox"/>				Yes	Jul 05 2010 15:57	Graphical chart	Trend Analysis
<input type="checkbox"/>				Yes	Jul 05 2010 16:00	Graphical chart, HTML, Excel	Trend Analysis

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.

The screenshot shows a web form for a Helpdesk Case. At the top, there are tabs for 'Details', 'Working', 'Time', 'Related Records', 'Emails', and 'History'. The case ID is 42. The status is 'Closed', priority is 'Medium', and it's assigned to the 'Support Team' and 'Chris Caldwell'. The 'User Information' section includes fields for Submitter Name (Hector Gomez), Submitter Login (internal), Submitter Phone (333-333-5555:102), Submitter Email (sample@example.com), Submitter Cell Phone, and Submitter Department (Finance). The 'Case Information' section includes fields for Type of Problem (Internet Connection), Subtype of Problem (Can't connect), Related to an Asset (Yes/No), Asset Type (Communication), Asset Tag, Asset Subtype, Asset Owner Name, and Summary (pany internet). A dropdown menu for Asset Type is open, showing options like Communication, Computer, Computer Peripheral, Data Center, Imaging/Printing, and Video Conferencing. A blue box labeled 'Linked to Asset Table' points to the 'Related to an Asset' field. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 9. 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. Basic SLA compliance is built in, but no information regarding Customer Company or contract status is applied. When an end user 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 must 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 show 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.

To update the customer on progress, technicians can simply type notes into the [Additional Information](#) field. A rule will automatically send an email to the customer telling them the case has been updated, and includes the new notes from the [Additional Information](#) field.

If technicians need to reassign the case to someone else, they can change 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. 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.

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 Case can probably 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 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 hyperlink 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 hyperlink 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.

SLAs and Time Tracking

Basic SLA compliance is built in to the Helpdesk Case table. On the [Time](#) tab, details about the applicable SLA are shown under the [SLA Dates](#) heading. The [SLA Title](#), [Working Hours to Complete](#), and [Working Hours to Warning Notification](#) are set by a rule that finds the right SLA based on matching the [Priority](#) and [Type of Problem](#) fields. The rule also sets the fields [SLA Due Date](#) and [SLA Warning Notification Date](#), which are used as triggers for email notifications to technicians. Users typically do not interact with these fields in the Helpdesk Case table.

If the [Priority](#) or the [Type of Problem](#) change after the case is created, another rule updates the SLA fields with the appropriate new values.

To alert users of approaching due dates, additional rule actions set the font color in the [table view](#) to red for records whose [SLA Warning Notification Date](#) has passed.

When the case's [Status](#) changes to Closed, the [Date Closed](#) is compared to the [SLA Due Date](#) to determine whether or not the SLA was met. If the SLA was met, the [Met SLA](#) field is set to 1 and [Closed within SLA](#) is set to Yes. Otherwise, [Met SLA](#) is set to 0 and [Closed within SLA](#) is set to No. Reporting on SLA success rates is best done on the numerical [Met SLA](#) field.

You can configure the specific SLA settings by modifying records in the [SLA TABLE](#).

Helpdesk Case

Save Cancel Details Working / Tasks **Time** Related Records Emails History << >>

ID 77

Status Open Priority High

Assigned Team Support Team Assigned Person Christopher Caldwell

SLA Dates

SLA Due Date Jun 16 2015 17:00 SLA Warning Notification Date Jun 15 2015 19:46

Date Closed Closed By

The time interval is based on working hours and assumes a 9 hour work day (from 8am to 5pm) M-F. This is the time after which a warning notification should be sent for records that are sti

Working Hours To Complete 9 hours 00 minutes Working Hours To Warning Notification 8 hours 00 minutes

SLA ID 16 SLA Title High priority helpdesk cases - all problem types and default

Time Entry

Time Spent H M Add Time

Time Description

Figure 10. The Time tab is used for time tracking and SLA compliance.

Time tracking is enabled and integrated with the Time Entry table. On the **Time** tab, staff can enter the time they spent into the **Time Spent** field and a description into the **Time Description** field while editing a helpdesk case. Then, click the **Add Time** button to automatically create a Time Entry record associated with the case.

All time entry records are shown on the **Time** tab in the helpdesk case, along with a running total of time spent. Reporting on time spent is done from 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.

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 and sets the SLA based on Priority and Type of Problem.

Runs: When created by web, email or API.

Search filter: None

Priority: 2

Actions:

I: All create actions

```
if (Priority!=NULL and Type of Problem!=NULL) {  
    Set SLA from Priority and Type of Issue  
    Set SLA Dates  
}  
// 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 Template Last HC ID  
}
```

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

Edit: Edit Actions (web, API)

Purpose: This rule handles notifications and row coloring based on SLA due date and warning date.

Runs: When edited by web or API.

Search filter: R: SLA Due Date or Warning Notification Date changed and not Closed

Priority: 22

Actions:

I: Edit Actions (web, API)

```
if (SLA Due Date<this minute) {  
    Set Alert Color to Red  
    Email Assigned Team and Person that SLA Due Date has passed  
}  
if (SLA Warning Notification Date changed from: any value to: any value during record's last modification and Status!='Closed' and (SLA Warning Notification Date<=10 minute in the future or SLA Warning Notification Date<=this minute)) {  
    Set Alert Color to Red  
    if (Assigned Person!=NULL) {  
        Email Assigned Person of Upcoming Due Date  
    } else {  
        Email Assigned Team of Upcoming Due Date  
    }  
} else if (SLA Warning Notification Date changed from: any value to: any value during record's last modification and Alert Color='Red' and SLA Warning Notification Date>=10 minute in the future) {  
    Set Alert Color to Default  
}
```

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
    Set Alert Color to Default
}
if (Assigned Person changed from: any value to: any value last user's modification and Assigned Person!='$updated_by') {
    Email assignee about reassignment
} else if
(Assigned
Team changed
from: any
value to: any
value last
user's
modification
and Assigned
Person=NULL)
{
    Email new assigned team about reassignment
}
if (Additional Notes To/From Customer changed from: any value to: any value last user's modification and Status not changed last user's modification) {
    Email customer that case has been updated
}
if ((Priority changed from: any value to: any value last user's modification or Type of Problem changed from: any value to: any value last user's modification) and Status!='Closed') {
    Set SLA from Priority and Type of Issue
    Set SLA Dates
}
if (Status changed from: any value to: 'Closed' last user's modification) {
    Set Alert Color to Grey
    if (Date Closed<=$sla_due_date) {
        Set Closed within SLA to Yes and Met SLA to 1
    } else {
        Set Closed within SLA to No and Met SLA to 0
    }
} else if (Status changed from: 'Closed' to: 'Reopened' last user's modification) {
    Set Alert Color to Default
}
}
```

Notes: This action notifies new assignees and sends an email to the customer if the additional notes are updated. Also resets the reopen flag when a reopened case is closed again, and changes SLA-based alert colors.

I: Trigger New Task Creation

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

Edit: Task Updates made by API

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

Runs: When edited by API only.

Search filter: R: Number of Tasks Completed has Changed

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  
  Set Alert Color to Default  
} else if (Status='Sent to Customer') {  
  Change to Updated by Customer  
}  
if ((Priority changed from: any value to: any value last user's modification or Type of Problem changed from: any value to: any value last user's modification) and Status!='Closed') {  
  Set SLA from Priority and Type of Issue  
  Set SLA Dates  
}  
// 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 validation 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.

TB: Daily check for SLA reminder and due date (disabled)

Purpose: This handles email notifications to warn the assigned person or team of upcoming or past SLA due dates.

Runs: Every 10 minutes (disabled).

Search filter: R: SLA Warning Date 10 minutes in future and SLA Due Date <=10 minutes old and not closed

Priority: 32

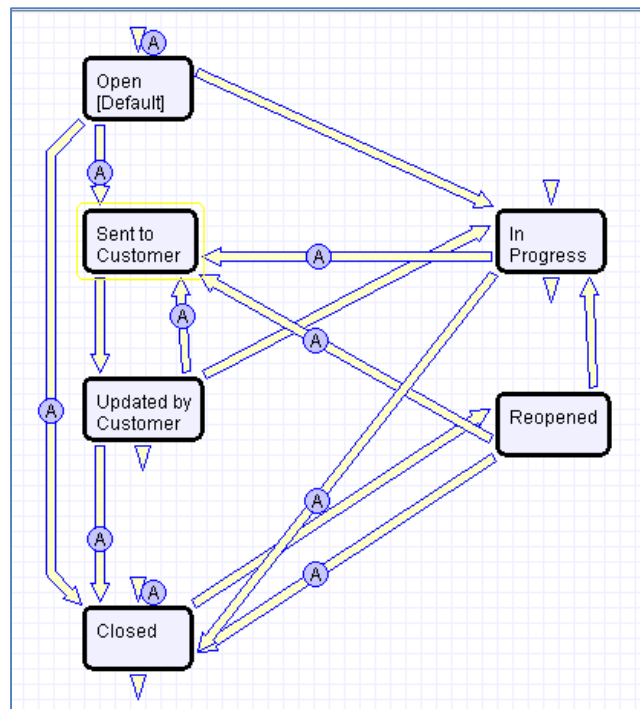
Actions:

I: Email Reminders about Due Date

```
if (SLA Warning Notification Date<=10 minute in the future) {  
    if (Assigned Person!=NULL) {  
        Email Assigned Person of Upcoming Due Date  
    } else {  
        Email Assigned Team of Upcoming Due Date  
    }  
} else if (SLA Due Date<=10 minute old) {  
    Email Assigned Team and Person that SLA Due Date has passed  
}
```

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: 22 record(s) found, 1 pages. Click here to re-count records.							
<input type="button" value="New"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>				<input type="button" value="Views"/> <input type="button" value="Help"/> <input type="button" value="Home"/>			
<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	May 30 2013 11:45	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	Jul 06 2010 15:10	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	Jul 06 2010 15:16	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status is Not Closed	Yes	Feb 16 2011 17:42	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Closed in past 3 months	Yes	Feb 16 2011 17:36	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Closed in past year	Yes	Feb 16 2011 17:40	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Status is Closed	No	Jun 12 2015 16:46	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Status is Closed	No	Jun 12 2015 16:47	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Status is Closed	No	Jun 12 2015 16:47	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status is Not Closed	No	Feb 16 2011 17:42	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status is Not Closed	No	Feb 16 2011 17:41	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status is Not Closed	No	Feb 16 2011 17:41	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	Apr 03 2014 12:39	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Closed in past 3 months	No	Feb 16 2011 17:38	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Closed in past year	No	Feb 16 2011 17:39	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Date Closed in Previous Month	No	May 01 2015 14:26	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Date Created in Previous Month	No	May 01 2015 14:26	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	C: Open and more than 1 month old	No	Feb 16 2011 17:38	Graphical chart, HTML, Excel	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	May 30 2013 11:47	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No	May 30 2013 11:51	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		No	Feb 16 2011 17:41	Graphical chart, HTML	Standard
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Yes	Jul 06 2010 15:29	Graphical chart, HTML, Excel	Trend Analysis

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.

The screenshot shows a 'Change Request' form with the following details:

- Header:** 'Change Request' with 'Save' and 'Cancel' buttons. Navigation tabs include 'Details', 'Approvals and Work', 'Related Records', 'Time', 'Emails', and 'History'.
- Metadata:** ID: 26, Urgency: Normal (selected), Status: Pending Approval (dropdown), Assigned Team: Support Team, Assigned Person: (empty dropdown).
- Requester Information:** *Requester: Agiloft System, *Requester Email: al_example@agiloft.com, *Requester Phone: (redacted), *Requester Manager: (empty).
- Request Information:** *Change Category: Account Access Request, *Risk if Done: High, *Risk if Not Done: High, *Related to: Support Case.
- Request Details:** Requested Date of Completion: Mar 28 2015 05:00, Estimated Time to Complete: 23, *Change Summary: Printer problem, Change Description: printed pages have white streaks, Business Justification: (empty), Backout Plan: (empty).
- Attached Files:** Attach/Manage button, No Files Attached.

Figure 11. 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 Change Request is created, the technician may choose an assigned team and assigned person. The assigned person field is filtered based on the assigned team drop-down.

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
```

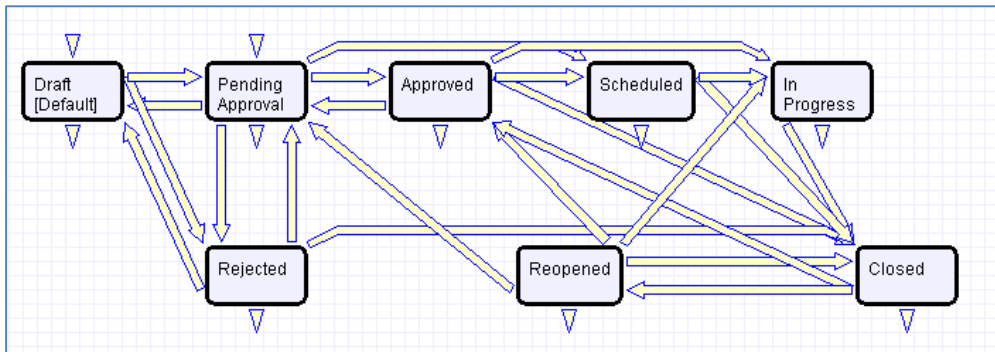
Notes: This rule will prevent users from approving a Change Request if they are not identified as the approver or a member of the approval team.

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.

New Copy Delete

Views

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

SLA Table

The SLA table is used in conjunction with Support Cases or Helpdesk Cases to ensure that service level agreements are met.

SLA

Save Cancel SLA Information History << >>

ID 16 *Related to Helpdesk Case

*SLA Title High priority helpdesk cases - all problem types and default

*Priority High

Helpdesk Type of Problem Email, Internet Connection, Laptop, Network, PC, Printer, Software, Telephone, Other, Service Request

The time interval is based on working hours and assumes a 9 hour work day (from 8am to 5pm) M-F. This is the time after which a warning notification should be sent for re

*Working Hours To Complete 9 H 00 M Working Hours To Warning Notification 8 H 00 M

Default Record When no Match Yes

Figure 12. Sample SLA record.

Use Case

The SLA table holds a record for each set of SLA response times. SLA records are applied to either Helpdesk Cases or Support Cases, set in the [Related To](#) field. Several SLA records are included by default. A particular SLA is tied to a Priority and one or more Types of Issue (for Support Cases) or Types of Problem (for Helpdesk Cases).

SLAs

Status: 14 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Actions Views Search

Edit	ID	Related to	SLA Title	Priority	Working Hours To Complete	Working Hours To Warning Notification
<input type="checkbox"/>	16	Helpdesk Case	High priority helpdesk cases - all problem types and default	High	9 hours 00 minutes	8 hours 00 minutes
<input type="checkbox"/>	14	Helpdesk Case	Critical helpdesk cases - all problem types	Critical	4 hours 00 minutes	3 hours 00 minutes
<input type="checkbox"/>	4	Helpdesk Case	High priority support cases - all issue types except question and documentation	High	9 hours 00 minutes	8 hours 00 minutes
<input type="checkbox"/>	3	Support Case	High priority support cases all types of issue except documentation and question	High	9 hours 00 minutes	8 hours 00 minutes
<input type="checkbox"/>	1	Support Case	Critical support cases - all issue types except question and documentation	Critical	1 hours 15 minutes	0 hours 30 minutes

Figure 13. The default SLA table and records.

Required fields, marked with a red asterisk, are: [Related To](#), [SLA Title](#), [Priority](#), and [Working Hours to Complete](#).

To create a new SLA, first choose the appropriate table in the [Related To](#) drop-down. Select the [Priority](#), then choose the specific [Types of Issue](#) or [Types of Problem](#) that are covered by this SLA, using the lookup icon.

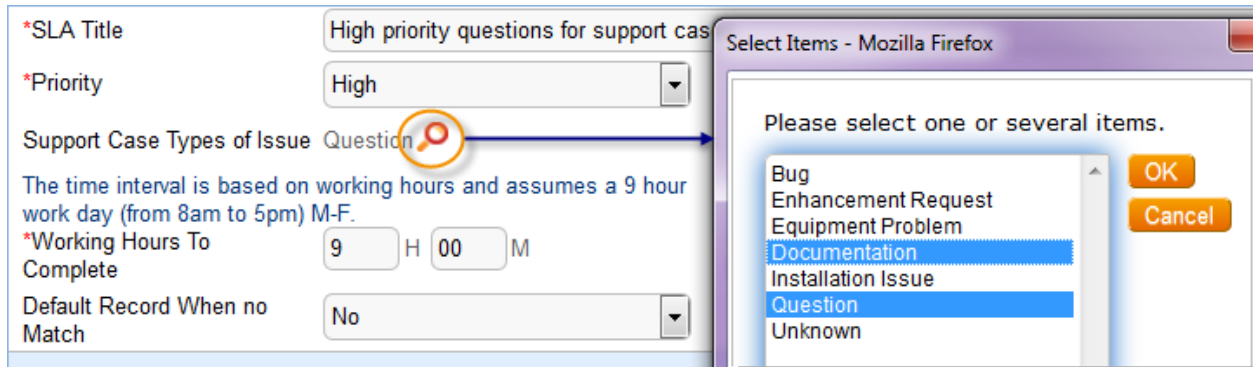


Figure 14. Use the icon to select the relevant types of issues.

In the [Working Hours to Complete](#) field, enter the amount of time in which the issue must be resolved for SLA compliance. If notifications are desired, enter the period of time before a notification is sent in the [Working Hours to Warning Notification](#) field. By default, the system excludes non-working hours of the Support Team when calculating the elapsed time that a ticket has been open.

Note that if you change the working hours of the Support Team, the [SLA Due Date](#) and [Warning Notification](#) settings will be affected.

When you finish adding all your records, there should be an SLA to cover every Priority/Issue combination. You can set a default SLA record that will be used if no matching SLA is found by setting the [Default Record When no Match](#) field to Yes.

Ownership

Records in this table are owned by the [Creator](#). Specifically, a record is owned by the user whose [Login](#) matches the [Creator Login](#) field.

Automation

The SLA table contains static data that supports other process tables. All rules and automation are run from the Support Case and Helpdesk Case tables.

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.

Asset

Asset Tag	<input type="text" value="12345567"/>	Serial number	<input type="text" value="12443634e634"/>
Status	<input type="text" value="In Stock"/>	*Disposition	<input type="radio"/> Shared Asset <input checked="" type="radio"/> Assigned to User
Asset Name		Dell OptiPlex GX150 MT:12443634e634	
		ID 28	

Asset Details

*Asset Type	<input type="text" value="Computer"/>	Asset Subtype	<input type="text" value="Desktop"/>
Model Manufacturer	<input type="text" value="Dell"/>	Vendor	<input type="text"/>
Model Name/Number	<input type="text" value="OptiPlex GX150 MT (P3 933MHZ, 256MB RAM, DVD-CD)"/>		
Model Description	<input type="text"/>		
Data Sheets and Pricing Info	<input type="text" value="No Files Attached"/>	Model Responsible Team	<input type="text" value="Support Team"/>
Model Abbreviation	<input type="text" value="OptiPlex GX150 MT"/>		
Memory (Gb)	<input type="text" value="64"/>	CPU	<input type="text" value="7155intel"/>
Operating System	<input type="text"/>	OS Version Detail/Service Pack	<input type="text"/>

Purchase Details

Date Purchased	<input type="text" value="Dec 06 2011"/>	Purchase Cost	<input type="text" value="\$ 1052"/>
PO Number	<input type="text"/>	Invoice Number	<input type="text"/>
Date Installed	<input type="text"/>	Date Warranty/Support Expires	<input type="text" value="Dec 05 2012"/>

Service Information

Date of Next Scheduled Service	<input type="text" value="Jul 12 2012"/>	<input type="text" value="12:43"/>	Date Last Upgraded	<input type="text"/>
--------------------------------	--	------------------------------------	--------------------	----------------------

Working Notes

Figure 15. 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.

The screenshot shows the 'Asset Relationships' tab in a software application. At the top, there are navigation buttons for 'Save', 'Cancel', 'Details', 'Relationships', 'Contracts', 'Requests', 'Emails', and 'History'. Below these are input fields for 'Asset Tag' (12345567) and 'Serial number' (12443634e634). A 'Status' dropdown is set to 'In Stock', and a '*Disposition' section has radio buttons for 'Shared Asset' and 'Assigned to User' (which is selected). The 'Asset Name' is 'Dell OptiPlex GX150 MT:12443634e634' and the 'ID' is '28'. The main content area is divided into two sections: 'Upstream Assets' and 'Downstream Assets'. Both sections indicate 'Status: No records.' and provide buttons for 'New', 'Unlink', and 'Views'.

Figure 16. 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 (disabled)

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

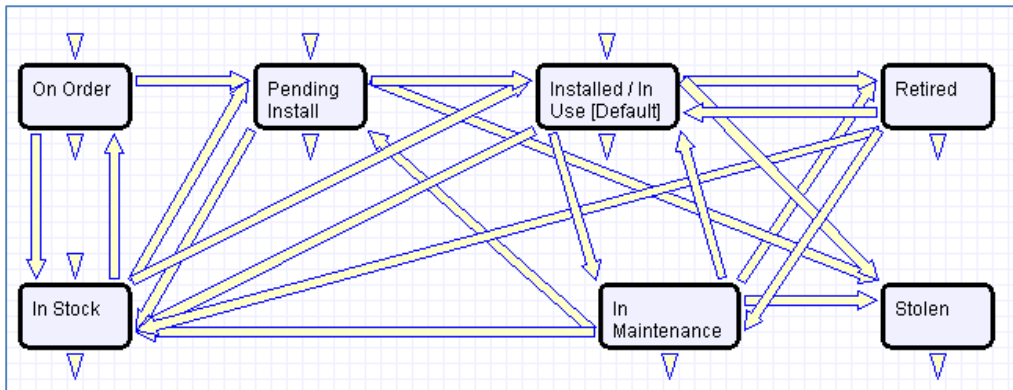
Actions:

E: Email Responsible Team of scheduled service

Template Name: Scheduled Service for Asset is due

Workflow

The Assets table has the following default workflow:



Reports

The Assets 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 ?

<input type="checkbox"/> Edit View	Title ↑	Published	Filter
<input type="checkbox"/>	Asset Ownership	Yes	
<input type="checkbox"/>	Asset Status	Yes	
<input type="checkbox"/>	Assets by Disposition, Pie chart and HTML	No	
<input type="checkbox"/>	Number of Assets by Asset Type	Yes	
<input type="checkbox"/>	Number of In Stock Assets of Asset Type	No	C: In Stock Assets
<input type="checkbox"/>	Service Due within next Month	No	C: Next service due within 1 month

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 holds the manufacturer, make, and model information for assets that may be purchased from vendors and stored in the Assets table. Vendor information is kept separately and indicated in the Asset record only, as a model may be sold by many vendors.

The screenshot shows a 'Model' record form with the following details:

- ID:** 148
- *Model Abbreviation:** 223-4494
- *Model Name/Number:** 223-4494 (Power Edge R200 Quad Core 2.1)
- Asset Type:** Data Center
- Asset Subtype:** Server
- Manufacturer:** Dell
- *Status:** Active (radio button selected)
- Model Description:** Quad Core 2.13Ghz/1066Mhz FSB/4GB
- Data Sheets and Pricing Info:** Attach/Manage button, No Files Attached
- Latest Unit Price:** \$ 2,450.00
- Date Price Last Updated:** May 10 2012
- Responsible Team:** Support Team

Figure 17. Sample Model record.

A model can be assigned to particular team that is responsible for any issues pertaining to their assigned models. If a Helpdesk Case is related to an Asset, the [Responsible Team](#) can be pulled into the Helpdesk Case and used to assign the record. The responsible team can also be pulled into the Asset record along with the Model as the team responsible for general asset maintenance.

Models are associated with an [Asset Type](#) and [Asset Subtype](#). This is used to filter records in the Asset table. When creating an Asset, the user selects an [Asset Type](#) and [Asset Subtype](#). The active models associated with the selected [Asset Type](#) and [Subtype](#) are then displayed.

Models have a [Status](#) of Active or Inactive. Inactive models can be associated with existing assets but cannot be selected when creating a new asset.

Pricing information can 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 can view all active models but do not have permission 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.

The screenshot shows the 'Software App' record form. At the top, there is a title bar with a 'Software App' icon and a 'Save' button. Below the title bar, there are tabs for 'Details', 'Related Info', and 'History'. The 'Details' tab is active. The form contains the following fields and controls:

- ID:** 9
- Status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- *Software Title/Version:** Office Professional Plus 2010
- *Manufacturer:** Microsoft (dropdown menu)
- Detail/Service Pack:** 14.0.6112.5000 (64-bit)
- *Type of Application:** Standard Desktop (dropdown menu)
- Description and Purpose:** A large text area for notes.
- Date of Initial Purchase:** A date picker.
- Date of Latest Purchase:** A date picker.
- Responsible Maintenance Team:** Support Team (dropdown menu)
- Responsible Team Leader:** A text field.
- Asset Polling name:** A text field.
- License Information:**
 - *Type of License:** CAL (Client Access License) (dropdown menu)
 - Total Number of Licenses:** 1
 - Number of Licenses Actively Used:** 1
 - Calculate:** A button to calculate license usage.
 - Number of Licenses Available:** A text field.
 - Person Responsible for License Purchases:** A text field with a search icon.

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and navigation arrows.

Figure 18. 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    			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>	  All Cases by Priority Funnel		Yes	Nov 29 2010 16:30	Graphical chart, HTML	
<input type="checkbox"/>	  All cases by Workflow State / Priority		Yes	Jul 05 2010 15:28	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  All cases segmented by Type of Issue / Priority		Yes	Jul 05 2010 14:53	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  All Cases. Pie chart by Type of Issue		Yes	Jul 05 2010 14:50	Graphical chart	
<input type="checkbox"/>	  Average elapsed time to close by Closed By person	All Closed Cases	No	Feb 16 2011 17:47	Graphical chart, HTML	
<input type="checkbox"/>	  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	
<input type="checkbox"/>	  Average time spent by staff to resolve Cases by Type of Issue		Yes	Feb 16 2011 17:44	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  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	
<input type="checkbox"/>	  Gauges of open Cases by Priority	Not Closed	Yes	Feb 16 2011 17:43	Graphical chart	
<input type="checkbox"/>	  My Assigned open Cases by Priority, funnel chart	My Assigned Support Cases	Yes	Feb 16 2011 17:45	Graphical chart, HTML	
<input type="checkbox"/>	  Number of Cases closed by Person by Priority	All Closed Cases	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  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	
<input type="checkbox"/>	  Number of Cases created each month of past year	C: Date Created in past year	Yes	Jul 05 2010 15:40	Graphical chart, HTML	
<input type="checkbox"/>	  Number of Cases created in past 3 months segmented by Week / Priority		Yes	Mar 23 2012 11:49	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  Number of Cases created in past month by day/ Priority	Created in past month	Yes	Jul 05 2010 15:53	Graphical chart, HTML, Excel	
<input type="checkbox"/>	  Open Cases by Assigned Person / Priority	Not Closed	No	Jan 25 2011 12:52	Graphical chart, HTML	
<input type="checkbox"/>	  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	
<input type="checkbox"/>	  Summary of Support Case activity		Yes	Feb 16 2011 17:33	HTML	
<input type="checkbox"/>	  Trend of Cases. Segmented by Type of Issue		Yes	Jul 05 2010 15:57	Graphical chart	
<input type="checkbox"/>	  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 19. 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 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 tracking is enabled and integrated with the Time Entry table. On the [Working](#) tab, staff can enter the time they spent into the [Time Spent](#) field and a description into the [Time Description](#) field while editing a helpdesk case. Then, click the [Add Time](#) button to automatically create a Time Entry record associated with the repair request.

All time entry records are shown on the [Time](#) tab in the helpdesk case, along with a running total of time spent. Reporting on time spent is done from 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.

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:

I: All Create 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 receipt 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

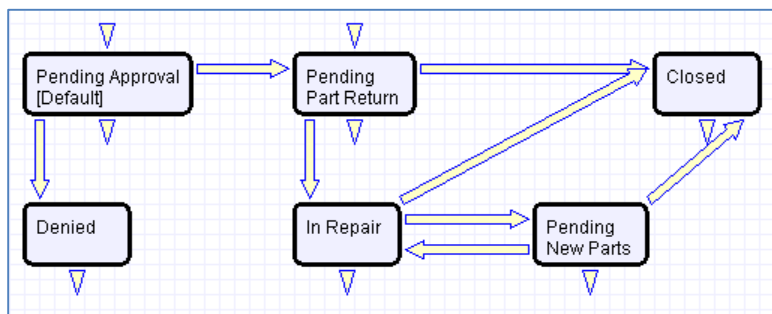
Actions:

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:

Charts/Reports

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

New Copy Delete

Views

<input type="checkbox"/> Edit View	Title ↑	Published	Filter
<input type="checkbox"/>	Open Repair Requests and Assignments	No	Not closed

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.

Repair Item

Save Cancel Details Working Time Spent Emails History << >>

ID 32 Linked RMA Number 68

Assigned To Jane Repairgal Status Completed

*Item Source Not in System Part Number 123-A4

Part Model Supreme Serial Number 1423462AB14

Part Description Dell Monitor

Description of Problem Repair or dispose of monitor as necessary.

Repair Customer Name Repair Customer Repair Customer Company IBM

Repair Type Replacement

Repair Assignee Repair Team Repair Status Closed

Save Cancel << >>

Figure 20. 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.

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:

I: All edit 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

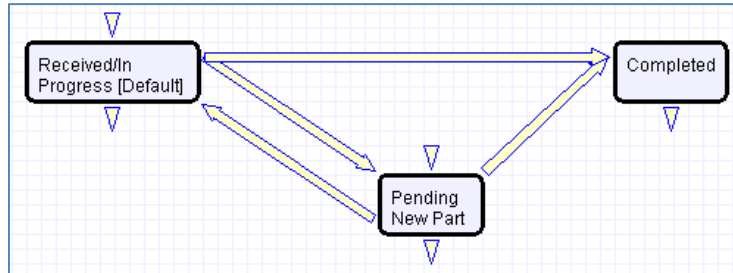
Actions:

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.

Contract

Save
Cancel
Details
Attachments
Approvals
Emails
Renewal / Related Contracts
Assets
Signature
Tasks
History
<< >>

ID: 143

*Record Type: Contract

*Internal Contract Owner: Jared Smith

*Contract Type: Subscription Service

Parent Contract ID:

Assigned Team: Contract Manager Team

Status: Active

Cancel Contract

Requester Information

Requester Name: Agiloft System

Requester Email: al_example@agiloft.com

For Department: Customer Support

Requester Phone: 415-232-4444 Ext.

Department Head: Ralph Knowles

Contract Information

Renewal Type: Notify Staff to Renew

*Contract Title: Hosted service subscription for one year

*Contract Description: For 20 users of our SAAS service.
Price increase of \$20000 over last contract.

*Contract Start Date: Mar 01 2015

Contract Amount: \$ 700,000

Contract Updates: Auto-Renewed Amended Rejected by Approver Auto-Renewal Terminated Manually Terminated

General Notes:

*Days in Advance to Notify for Renewal: 45

*Contract End Date: Feb 28 2016

Contract Party Information

Company Name: Apple

Figure 21. 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.

The screenshot shows the 'Contract' form with the following fields and values:

- ID: 163
- *Record Type: Amendment
- *Parent Contract ID: 143
- *Internal Contract Owner: Jared Smith
- Assigned Team: Contract Manager Team
- *Contract Type: Subscription Service
- Status: Draft

Buttons: Submit for Review, Cancel Contract

Figure 22. 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.

The screenshot shows the 'Contract' form with the following fields and values:

- ID: 163
- *Record Type: Amendment
- *Parent Contract ID: 143
- *Internal Contract Owner: Jared Smith
- Assigned Team: Contract Manager Team
- *Contract Type: Subscription Service
- Status: Draft

Buttons: Cancel Contract

Figure 23. 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 companies and contacts during contract creation

In the **Contract Party Information** section, users can find and link to an existing company, or create new ones as needed. To find an existing company record, use the lookup icon to search for the company. If the contract party isn't found, staff users can add a new company by selecting **New Company**. Enter the name and address information, then click **Create Company**.

The screenshot shows the 'Contract Party Information' form. At the top, there are two radio buttons: 'Existing Company' (unselected) and 'New Company' (selected). To the right of these buttons is an orange 'Create Company' button with a blue arrow pointing to it. A red warning message above the button reads: 'Be sure to click this button, after confirming that this company does not exist. Otherwise, the contract will not be properly linked to a contract party.' Below the radio buttons, the form contains several input fields: '*Company Name' (Anyhere Widgets), '*Street Address' (1 Road St.), '*City' (Anywhere), and '*Zip or Postal Code' (000000). To the right, there are dropdown menus for '*Primary Role' (Vendor), '*Country' (USA), and '*State' (CA). A 'Street Address 2' field is also present but empty.

Figure 24. Create and link to new company records when filling out the new contract form.

Both company and location records are created in the background, and linked to the new contract when the record refreshes.

The screenshot shows the 'Contract Party Information' form after record creation. The 'Existing Company' radio button is now selected. The 'Company Name' field displays 'Anywhere Widgets' in blue text with a small red circle icon next to it. The 'Location Name' dropdown menu is set to 'Anywhere Widgets - Anywhere'. Other fields remain the same: 'Street Address' (1 Road St.), 'City' (Anywhere), 'Country' (USA), and 'Zip or Postal Code' (000000).

Figure 25. Company records created in the contract form are automatically linked after record creation.

Similarly, you can create new entries in the people table if the main contact for the contract party is not an existing contact. Select **New Contact**, enter the information, and click **Create Main Contact**. Multiple contacts can be created in this way, and then the primary contact can be selected from the Main Contact dropdown.

Figure 26. Create a new contact if the contract party is not yet in the system.

When Contract Requesters submit a new contract through the end user interface, they can enter new company and contact information, but they don't see the buttons to create new records. When a contract is submitted for review, Contract Managers can edit the contract party information, or click the button to confirm the new company or contact and finish adding records.

This setup is intended to prevent end users from creating duplicate companies with slightly different spellings and to ensure that contract managers have ownership and control of this data. Permissions can be changed easily to allow end users to use the buttons to create companies and contacts directly.

Note that it is important for the contract managers to evaluate the new additions and either replace with existing data or click the buttons to create the appropriate background data. Otherwise, the linked data can't be used in print templates and emails.

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 creates an attachment record to hold the attached file. It also increments the **Version Number** field.

If the **Contract Party Information** section is not properly filled out and linked to records, a validation action warns the user to finish creating new records before generating the attachment.

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.

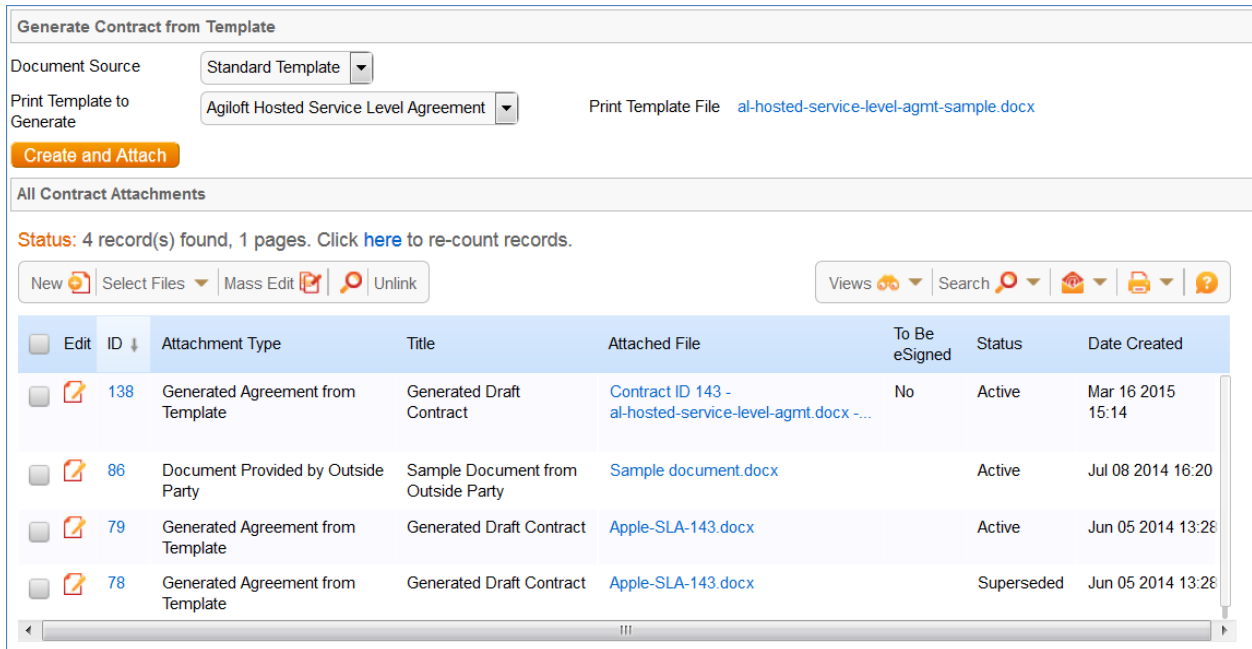


Figure 27. Attachments are managed and created on the Attachments tab.

Working with attachments

The [All Contract Attachments](#) related table is also used to manually create and attach files to the contract, such as performance bonds, signed agreements, or other documents from the contract parties. 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 using DocuSign integration. 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** action sets the Status of the selected file to Superseded.

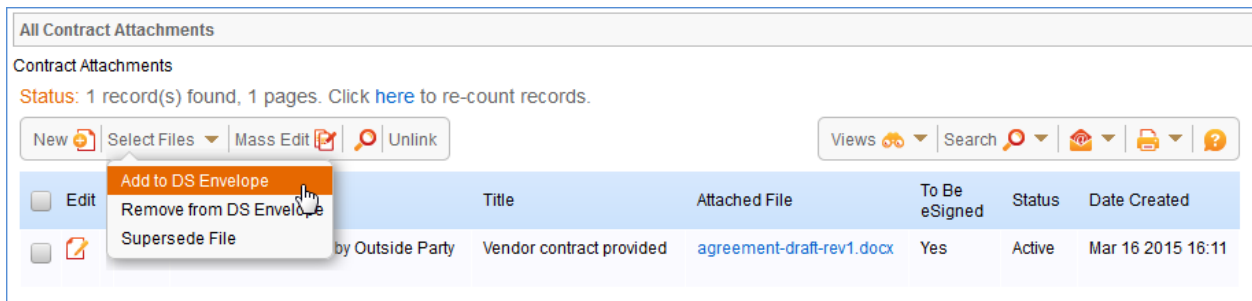


Figure 28. Attachments can be added or removed from the DocuSign envelope before sending.

For more information on Attachments, refer to the [ATTACHMENTS TABLE](#) section.

Tracking insurance certificates

The **Attachments** tab also holds a *related table* that can be used to track insurance certificates separately from other types of attachments. Certificates can be found directly in the Insurance Certificates table, and in *related tables* in both the Company and Contracts tables.

Insurance Certificates							
Status: 1 record(s) found, 1 pages. Click here to re-count records.							
New		Mass Edit	Delete	Unlink	Actions	Views	Search
Edit	ID ↓	Type of Certificate	For Company Name	Status	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/>	3	Excess Liability	Asian Digital	Valid	\$500,000.00	Mar 05 2016	

Figure 29. Create and manage insurance certificates on the Attachments tab.

When you add an insurance certificate to a company record, it is automatically linked to all pending or active contracts with that vendor by a daily time-based rule (disabled by default).

To create a certificate from a contract record, click **New** on the related table **action bar**; the certificate will be automatically linked to the contract. You will need to look up the company vendor in the **For Company Name** field when creating certificates from a contract.

Insurance Certificates							
Status: 2 record(s) found, 1 pages. Click here to re-count records.							
New		Mass Edit	Delete	Unlink	Actions	Views	Search
Edit	ID ↓	Type of Certificate	For Company Name	Status	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/>	15	Professional Liability	Agiloft	Valid	\$100,000.00	Jun 24 2015	
<input type="checkbox"/>	3	Excess Liability	Asian Digital	Valid	\$500,000.00	Mar 05 2016	

Insurance Certificates				
Status: 11 record(s) found, 1 pages Click for details...				
Edit	ID ↓	Type of Certificate	For Company Name	Status
<input type="checkbox"/>	15	Professional Liability	Agiloft	Valid
<input type="checkbox"/>	14	Excess Liability	Acme Micro	Valid
<input type="checkbox"/>	13	General Liability	Apple	Contract Inacti
<input type="checkbox"/>	12	Other	Apple	Contract Inacti
<input type="checkbox"/>	8	Other	IBM	Expired

Figure 30. Use the lookup icon to find and link to existing insurance certificates.

The **Insurance Certificate Owner** (defined in the company record) is notified fourteen days before an insurance certificate's **Expiration Date**. When a certificate expires without being renewed, the **Contract Managers** of any related active contracts are notified on the date of the expiration.

For more information about insurance certificates and related automation, see the [INSURANCE CERTIFICATES TABLE](#) section.

Another method for managing insurance certificates

You may prefer to manage insurance certificates as contract attachments, instead of using the Insurance Certificates table. For example, if Contract Managers are responsible for renewing and maintaining insurance certificates, it may be best to use the Attachments table to hold the certificates, along with all other types of attached documents for contracts. Managing insurance certificates as contract attachments means the **Contract Manager** will receive email notifications instead of the **Internal Certificate Owner**.

If this method makes the most sense for your particular business, you can remove the default Insurance Certificates field from the contract **layout**. Then, go to the Attachment Type table and edit the record

called Insurance Certificate. By default, this record's **Status** is Inactive; change the **Status** to Active to make it visible in the Attachments table.

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 **Approvals** tab.

The screenshot displays the 'Approvals' interface. At the top, it shows the workflow title 'One Step Legal Approval' and a 'Launch Approval Process' button. Below this, a status message reads 'Status: 1 record(s) found, 1 pages. Click here to re-count records.' A toolbar contains options like 'New', 'Mass Edit', 'Delete', 'Unlink', and 'Actions'. A table lists approval records with columns for 'Edit', 'ID', 'Step Number', 'Approval Title', 'Approval Team', 'Approver', 'Status', 'Approval Notes', 'Approved/Rejected By', and 'Date Approved/Rejected'. The table shows one record with ID 367, Step Number 1, Approval Title 'Legal Review', Approval Team 'Legal Team', and Status 'Requires Change again'. Summary statistics at the bottom indicate 'Number of Approvals Needed' is 1 and 'Number of Approvals Completed' is 0, with a 'Calculate' button. The 'Approval Notes' section features a text area containing a note from 'Agiloft Admin Mar 12 2015 15:01' with the text 'changes are needed'.

Figure 31. 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**.

Send Email

Recipient(s) Internal Contacts ▾

Click the magnifying glass to search for internal contacts to cc.

Internal Contact(s) to Email

- Helen Jensen
- Martin Brentman

Add email addresses separated by comma or semi-colon to cc people on the outbound email.

Emails to CC

Email Subject

Email Text

Select any files that you want to send with the email. Only active attachments will be available.

Files to Send with Email

Contract ID 338 - al-hosted-service-level-agmt.docx - Document Version 1.docx

Send Email

Email Communication History

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

New ▾ |
 New Email |
 Reply |
 Reply to all |
 Forward |
 Delete |
 Actions ▾

Views ▾ |
 Search ▾ |
 ▾

ID ↓	To	Subject	Content	Attachments	Created On
843	example32@exam le.com, mbrentman@exam ple.com		<small>Contract Title: Service Contract Contract Start Date: Apr 01 2015 Contract End Date: Mar 31 2016...</small>	<small>Contract ID 338 - al-hosted-service-level-agmt.docx - Document Version 1.docx</small>	Mar 16 2015 16:29

Figure 32. 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.

Contract

Save Cancel Details Attachments Approvals Emails Related Contracts Renewal **Assets** Tasks DocuSign History

ID 221 *Record Type Subcontract

*Internal Contract Owner Jared Smith Assigned Team Contract Manager Team

*Contract Type Service Contract Status Active

Cancel Contract

Asset Information

Asset Involvement For One or More Assets

Assets in this Contract

Click the magnifying glass to look up and associate assets with this contract

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

New Mass Edit Delete Unlink Actions Views Search

Edit	ID ↓	Asset Name	Asset Type	Asset Subtype	Status
	40	Apple iPhone 4s:235346456	Communication	Mobile Phone	Installed / In Use
	28	Dell OptiPlex GX150 MT:12443634e634	Computer	Desktop	In Stock
	27	Compaq 470033-811:1244363	Computer	Desktop	Installed / In Use

Figure 33. 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.

Asset Information

Asset Involvement For Software Application

Software Title/Version Windows 7

Software Manufacturer Microsoft

Type of License Individual Number of Licenses 16

Date of Latest Purchase

Responsible Team Responsible Person

Figure 34. 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.

<input type="checkbox"/>	Edit	Status	Envelope	Subject	Sender	Linked Record	Attached Documents	Create & Preview	Send	Signed Documents
<input type="checkbox"/>		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.

<input type="checkbox"/>	Edit	ID	Send Order	↑↓	Status	Full Name	Email	Title	Role Name	Message	Envelope
<input type="checkbox"/>		1	1		Draft	Martin Brentman	mbrentman@example.com		InternalSigner		
<input type="checkbox"/>		2	2		Draft	Maurice Sendak	example26@example.com	Engineer	Customer1		
<input type="checkbox"/>		3	3		Draft	Weston Presley	example41@acme.com	Director of Purchase	Customer2		

Figure 35. 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.

The screenshot shows the 'Contract' form with the following fields and values:

- ID: 143
- *Record Type: Contract
- *Internal Contract Owner: Jared Smith
- *Contract Type: Subscription Service (highlighted)
- Parent Contract ID: (empty)
- Assigned Team: Contract Manager Team
- Status: Active

Buttons: Save, Cancel, Details, Attachments, Approvals, Emails, Renewal / Related Contracts, Assets, Signature, Tasks, History, Cancel Contract.

Figure 36. 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.

The screenshot shows the 'Approvals' section with the following elements:

- Workflow Title: 4 sequential: Dept head, finance, (compliance), legal (highlighted)
- Buttons: Create Approvals, Launch Approval Process, Recheck Conditional Approvals
- Approvals Needed: Status: No records.
- Toolbar: New, Mass Edit, Delete, Unlink, Actions, Views, Search
- Number of Approvals Needed: (empty)
- Number of Approvals Completed: (empty)
- Calculate button

Figure 37. Select the Workflow Title to choose the series of approvals needed.

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.

The screenshot shows the 'Contract' form with the following fields and values:

- ID: 478
- *Record Type: Contract
- *Internal Contract Owner: Agiloft System
- *Contract Type: Subscription Service
- Parent Contract ID: (empty)
- Assigned Team: Contract Manager Team
- Status: Pending Approval

Buttons: Edit, Close, Details, Attachments, Approvals, Emails, Renewal / Related Contracts, Assets, Signature, Tasks, History, Cancel Contract.

Progress bar: Current: Step 1, Step 2, Step 3

Figure 38. 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.

The screenshot displays the 'Approval' interface for a contract. At the top, there are tabs for 'Details', 'Related Approvals', 'Emails', and 'History'. Below the tabs, the contract ID is 377, and the status is 'Pending Approval'. The approval title is 'Department Head Review'. Three action buttons are visible: 'Approve', 'Require Changes', and 'Permanently Reject'. The 'Approval Details' section includes fields for 'Related To' (Contracts), 'Step Number' (1), 'Approval Team' (Support Manager Team), and 'Approver' (Ralph Knowles). There is a large text area for 'Approval Notes'. Below this, there are sections for 'Approval Running Notes', 'All Contract Approval Notes', and 'Attachments'. The 'Contract Details' section at the bottom provides information about the contract, including the company name (Xerox), contract manager (Agiloft System), title (Copier installation and maintenance), description (Vendor will install and maintain 2 multi-function copy machines in Agiloft offices), start date (Mar 16 2015), and amount (\$20,000).

Figure 39. Approvers use one of three action buttons to change 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.

Generate a Related Contract Record	
New Record Type	Amendment ▼ Create Related Contract
Related Amendments	Choose one Contract
	Subcontract
	Amendment
Status: No records.	

Figure 40. 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.

Renewal Information	
Renewal Notification Date	Jan 17 2016 📅 Create Renewal Contract
Previous Contract for which this is a Renewal	
Previous Contract	Hosted service subscription for one year 🔍
Previous Contract ID	136 🔍
Previous Contract End Date	Aug 28 2015

Figure 41. 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.

Contract

Save Cancel Details Attachments Approvals Emails Renewal / Related Contracts Assets Signature Tasks History

ID 143

*Record Type Contract Parent Contract ID

*Internal Contract Owner Jared Smith Assigned Team Contract Manager Team

*Contract Type Subscription Service Status Active

Cancel Contract

Figure 42. 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.

Contract

Save Cancel Details Attachments Approvals Emails Renewal / Related Contracts Assets Signature Tasks History

ID 141

*Record Type Contract Parent Contract ID

*Internal Contract Owner Jared Smith Assigned Team Contract Manager Team

*Contract Type Product Support and Upgrades Status Approved

Mark as Signed

Cancel Contract

Figure 43. 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 but do not work on other users' records. Below is a representative home page for an end user in the Contract Creator group.

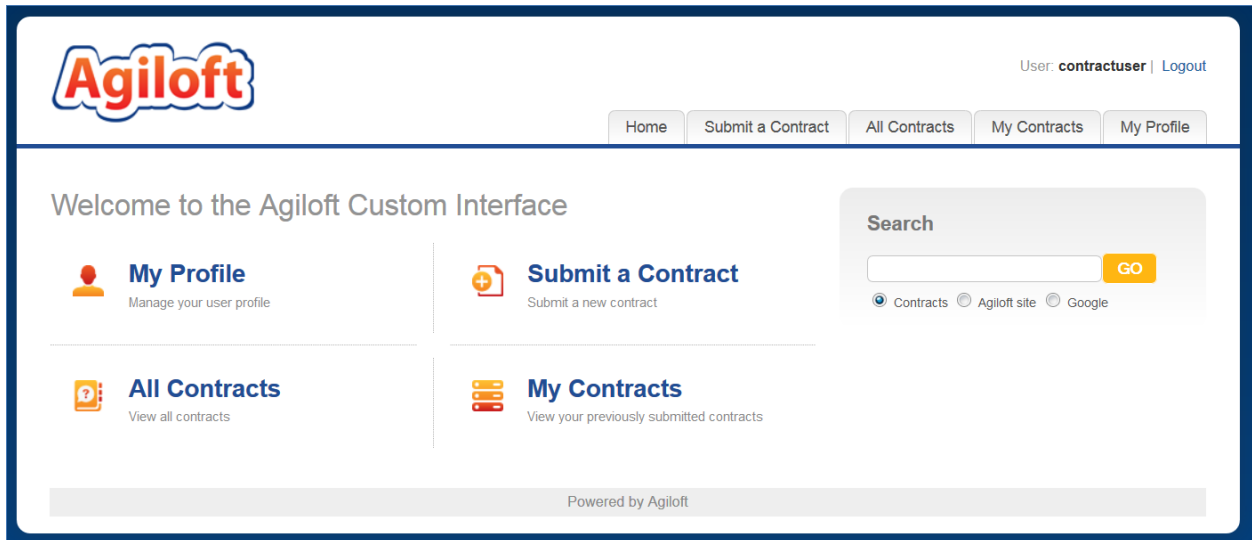


Figure 44. Home page for Contract Creators in the default end user interface.

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 45. Contract Creators see a simplified contract form in the EUI.

In the [Contract Party Information](#) section, users can find and link to an existing company and contact, or create new ones as needed. Select [New Company](#) and then enter the name and address information. After the contract is submitted for review, Contract Managers can confirm the new company to finish adding a record. Similarly, end users can suggest a new company contact by filling out the fields in the [Party Main Contact](#) section of the form.

Contract Party Information			
Contract Party Entry: <input type="radio"/> Existing Company <input checked="" type="radio"/> New Company			
*Company Name	<input type="text"/>	*Primary Role	Vendor <input type="button" value="v"/>
*Street Address	<input type="text"/>	Street Address 2	<input type="text"/>
*City	<input type="text"/>	*Country	USA <input type="button" value="v"/>
*State	Choose one <input type="button" value="v"/>		
*Zip or Postal Code	<input type="text"/>		
Party Main Contact			
Company Contact Entry: <input type="radio"/> Existing Contact <input checked="" type="radio"/> New Contact			
*First Name	<input type="text"/>	*Last Name	<input type="text"/>
*Email	<input type="text"/>	Phone	<input type="text"/> Ext. <input type="text"/>

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 new attachments uploaded to the [Transitional Contract Files](#) field by converting them into Attachment records.

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

Updated Fields: [Transitional Contract Files](#), [Transitional Attachment Title](#), and [Transitional Attachment Type](#).

Updated Values: Null.

Summary: This resets the [Transitional Contract Files](#), [Transitional Attachment Title](#), and the [Transitional Attachment Type](#) fields to empty after the conversion takes 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.

Template Name: Outside party has updated contract.

Summary: This email notifies the relevant users that an outside party 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, including edits made 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

Error Message: Based on the number of days specified, the [Renewal Notification Date](#) is in the past, and no email will be sent.

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 fields* 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

Summary: The actions below update several fields in the Approvals table.

Chain: Contract ← Approval through fields: All Contract Approval Notes, Contract Assigned Team, Contract Company Name, Contract Amount, etc.

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: Update Next Approvals in Approval Records

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: Notify of upcoming expirations (disabled)

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

Runs: 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

Template Name: Contract renewal notification date has arrived.

Summary: Reminds the [Contract Manager](#) of 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: 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: Every 2 days at 12 PM

Search Filter: R: Active, End date passed

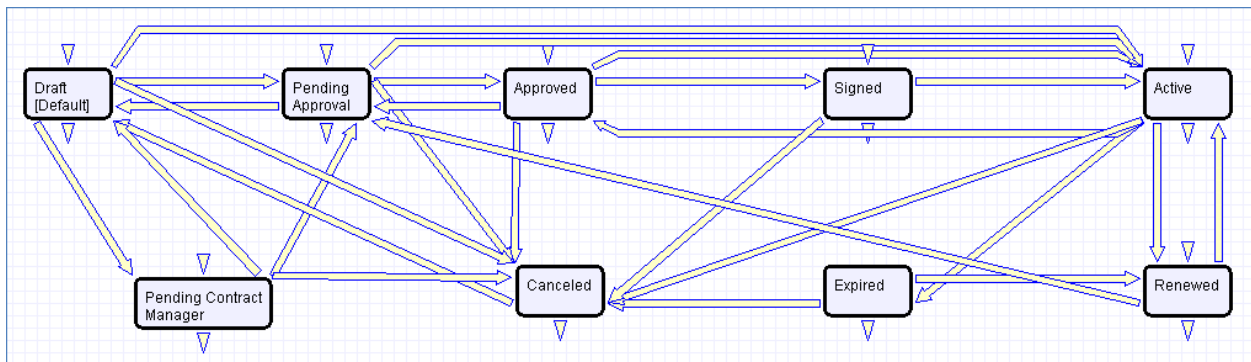
Priority: 5

I: Set to Expired or Renewed

```
if (Renewal Contract ID!=NULL) {
    Set Status to Renewed
    Set Alert Color to Grey
} 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
    Set Alert Color to Grey
}
```

Workflow

The Contracts table has the following default workflow:



Reports

The Contracts 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 				
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	
<input type="checkbox"/>  	All Active Contracts with Vendors	Active Vendor Contracts	Yes	
<input type="checkbox"/>  	All Active Customer Contracts	Active Customer Contracts	Yes	
<input type="checkbox"/>  	Contract Expirations in next 90 days	Active Contract expiring within next 90 days (C)	Yes	
<input type="checkbox"/>  	Contracts by Party Type		No	
<input type="checkbox"/>  	Contracts by Type		No	
<input type="checkbox"/>  	Contracts in Progress	Contracts with an in progress Status (C)	Yes	
<input type="checkbox"/>  	Contracts Pending Approval by Contract Type	Status is Pending Approval	Yes	
<input type="checkbox"/>  	In Progress Contracts		Yes	
<input type="checkbox"/>  	Value of Signed Customer Contracts starting in Past year	C: Active Customer Contracts whose start date is less than a year ago	No	
<input type="checkbox"/>  	Value of Signed Vendor Contracts starting in Past year	C: Signed Vendor Contracts whose start date is less than a year ago	No	

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.

Contract Types
 Status: 9 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Actions

Views Search

<input type="checkbox"/> Edit	ID ↑	Contract Type	Available for Parties	Default Workflow Title	Has Print Template(s)	Print Template Title	Status
<input type="checkbox"/>	3	Product Support and Upgrades		Alternate One Step Legal Approval	Yes	Agiloft Customer Support Agreement	Active
<input type="checkbox"/>	4	Software License		Alternate One Step Legal Approval			Active
<input type="checkbox"/>	5	Subscription Service		Alternate One Step Legal Approval	Yes	Agiloft Hosted Service Level Agreement	Active
<input type="checkbox"/>	6	Parts only Contract		Alternate One Step Legal Approval			Active
<input type="checkbox"/>	7	Service Contract		Alternate One Step Legal Approval	Yes	Agiloft Hosted Service Level Agreement	Active
<input type="checkbox"/>	8	Goods and Services		Alternate One Step Legal Approval			Active
<input type="checkbox"/>	9	Non-Disclosure Agreement		Alternate One Step Legal Approval			Active
<input type="checkbox"/>	10	Partner Agreement		Alternate One Step Legal Approval			Active
<input type="checkbox"/>	11	Other		Alternate One Step Legal Approval			Active

Figure 46. 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.

Contract Type

Save
Cancel
Contract Type
Print Templates and Workflows
History
<< >>

ID 9
Status Active

***Contract Type**

This field can be used to show or hide fields in the Contract by making them visibility dependent on whether this field (when pulled into the Contract along with the Contract Type) contains a particular value. If you do not choose Contract Start Date and Contract End Date, then those fields will not be displayed in the Contract.

Extra Fields to Show

Description

Default Workflow Title

Has Print Template(s) Yes No

***Default Print Template Title** ***Print Template File** [al-non-disclosure-agreement.docx](#)

Save
Cancel
<< >>

Figure 47. 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.

Available Print Templates

All Available Print Templates
Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Unlink Actions
Views Search

<input type="checkbox"/>	Edit	ID ↓	Title	Status	Template File
<input type="checkbox"/>		4	Agiloft Non-Disclosure Agreement	Active	al-non-disclosure-agreement.docx

Available Workflows

Available Workflows
Status: 4 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Unlink Actions
Views Search

<input type="checkbox"/>	Edit	ID ↓	Workflow Title	Used in	Number of Approvals	Status
<input type="checkbox"/>		27	5 - Manager/Dept head, with conditional legal and finance	Contracts	5	Active
<input type="checkbox"/>		17	2 step: Dept head and legal	Contracts	2	Active
<input type="checkbox"/>		9	One Step Legal Approval	Contracts	1	Active
<input type="checkbox"/>		2	4 sequential: Dept head, finance, (compliance), legal	Contracts	4	Active

Figure 48. The Print Templates and Workflows tab of a contract type record.

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

```
if (Default Print Template ID!=NULL) {  
    Add Contract Type ID to linked Print Template  
}  
if (Default Workflow ID!=NULL) {  
    Add Contract Type to Workflow Contract Types  
}
```

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

```
if (Default Print Template ID changed from: any value to: any value last user's modification and Default Print Template ID!=NULL) {  
    Add Contract Type ID to linked Print Template  
}  
if (Default Workflow ID changed from: any value to: any value last user's modification and Default Workflow ID!=NULL) {  
    Add Contract Type to Workflow Contract Types  
}
```

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.

Attachment

Attachment
Contract Info
Emails
History














ID	75		
Attachment Type	<input type="text" value="Signed Agreement"/>	*Status	<input type="text" value="Active"/>
*Title	<input type="text" value="Agiloft Service Level Agreement"/>		
*Attached File	<input type="button" value="Attach/Manage"/> <input type="text" value="1. Agiloft-SLA-224.docx"/>	Merged File	<input type="button" value="Attach/Manage"/> <input type="text" value="No Files Attached"/>
Previous Attached File	<input type="text" value="No Files Attached"/>	Previous Attachment ID	
Previous Attachment	<input type="text" value=""/>	Supercede Old Versions	<input type="text" value="No"/>
Publication Level	<input type="text" value="All Internal"/>	To Be eSigned	<input type="text" value="Choose one"/>
Include in Approval Packet	<input type="text" value="No"/>		<input type="button" value="Merge Signature Block"/>

Figure 49. 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.

All Contract Attachments								
Status: 4 record(s) found, 1 pages. Click here to re-count records.								
New  Select Files  Mass Edit  Unlink 			Views  Search    					
<input type="checkbox"/> Edit	ID ↓	Attachment Type	Title	Attached File	To Be eSigned	Status	Date Created	
<input type="checkbox"/>	 138	Generated Agreement from Template	Generated Draft Contract	Contract ID 143 - al-hosted-service-level-agmt.docx -...	No	Active	Mar 16 2015 15:14	
<input type="checkbox"/>	 86	Document Provided by Outside Party	Sample Document from Outside Party	Sample document.docx		Active	Jul 08 2014 16:20	
<input type="checkbox"/>	 79	Generated Agreement from Template	Generated Draft Contract	Apple-SLA-143.docx		Active	Jun 05 2014 13:28	
<input type="checkbox"/>	 78	Generated Agreement from Template	Generated Draft Contract	Apple-SLA-143.docx		Superseded	Jun 05 2014 13:28	














Insurance Certificates						
Status: 4 record(s) found, 1 pages. Click here to re-count records.						
New  Mass Edit  Delete  Unlink  Actions 			Views  Search   			
<input type="checkbox"/> Edit	ID ↓	Type of Certificate	Status	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/>	 13	General Liability	Contract Inactive	\$11,211.00	Feb 27 2014	
<input type="checkbox"/>	 12	Other	Contract Inactive	\$10,000.00	Jan 15 2015	
<input type="checkbox"/>	 4	Other	Valid	\$10,000.00	May 18 2015	
<input type="checkbox"/>	 2	Professional Liability	Expired	\$250,000.00	Apr 23 2015	

Figure 50. 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 (Supersede 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.

Attachment Types
 Status: 7 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Actions

Views Search

<input type="checkbox"/> Edit	ID ↓	Attachment Type	Fields to Show	Sort Order
<input type="checkbox"/>	7	Supporting Document		9
<input type="checkbox"/>	6	Performance Bond	Expiration Date, Coverage Amount	7
<input type="checkbox"/>	5	Insurance Certificate	Expiration Date, Type of Certificate, Coverage Amount	6
<input type="checkbox"/>	4	Document Provided by Approver		3
<input type="checkbox"/>	3	Document Provided by Outside Party		1
<input type="checkbox"/>	2	Signed Agreement		4
<input type="checkbox"/>	1	Generated Agreement from Template		5

Figure 51. 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.

Insurance Certificates Table

This table holds insurance certificates linked as attachments to Companies and Contracts. Each record in the table represents one insurance certificate linked to a unique vendor company, but may be linked to one or more contracts.

Use Case

Insurance certificates can be created in one of three ways:

- From a Company record, using the related table on the **Related Records** tab (preferred)
- From a particular Contract record, using the related table on the **Attachments** tab
- From the Insurance Certificate table **action bar**

New Insurance Certificates are created with a default **Status** of Valid. They may also have a **Status** of Expired or Contract Inactive. The **Expiration Date** and **Main Contact** are required fields. The **Main Contact** is the person at the vendor company from whom a replacement certificate can be requested. You can customize the **Type of Certificate** choice list as needed; the default options include Auto, Worker's Comp, Excess Liability, General Liability, etc.

Insurance Certificate

Save Cancel Details Emails History <>

Insurance Certificate Information

ID: 14 Type of Certificate: Excess Liability
Amount of Coverage: \$ 35,500.00 *Expiration Date: May 27 2016
Status: Valid Attached Files: Attach/Manage
No Files Attached

Company Details

For Company Name: Acme Micro
*Main Contact:
*Main Contact Phone: *Main Contact Email:

Contracts

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

ID	Contract Title	Contract Type	Contract Start Date	Contract End Date	Contract Amount	Status
3	Annual support contract for Acme	Vendor Product Support and Upgrades	Apr 28 2014	Apr 28 2015	\$350,000	Expired

Figure 52. The default tab of an Insurance Certificate.

Insurance certificates are primarily linked to vendor companies in the Company table. Once you add an insurance certificates to a vendor record, it can be linked to any contracts with that vendor.

Insurance certificate records contain information about related contracts for reference, held in the [Contracts](#) field. A time based rule, disabled by default, is designed to update the [Contracts](#) linked field with all contracts for that vendor that are currently pending or active. As a result, insurance certificates are automatically displayed within those contracts.

An [Insurance Certificate Owner](#) is defined in the company record just above the [Insurance Certificates related table](#). The [Insurance Certificate Owner](#) is notified fourteen days before one or more certificates is due to expire.

When the [Expiration Date](#) arrives, the certificate’s [Status](#) is updated in one of two ways:

- If any of the associated contracts have a [Status](#) of Active, the system updates the certificate’s [Status](#) to Expired and an email notification is sent to all the Contract Owners about the expired insurance certificate.
- If none of the related contracts are Active, the system updates the certificate’s [Status](#) to Contract Inactive.

Ownership

Insurance Certificate records are owned by their creator. Specifically, an Insurance Certificate record is owned by the user whose [Login](#) matches the [Creator Login](#) field.

Automation

The Insurance Certificates table has the following rules set up. A rule running on the Company table sends notifications about upcoming expiring certificates.

TB: Update Contracts (daily) (disabled)

Purpose: This rule updates the linked field of Contracts to find all contracts related to the insurance certificate.

Runs: Daily at 1:00 AM

Search Filter: R: Status is Valid

Priority: 0

Action:

U: Set Default Contracts

Updated Field: Contracts

Updated Value: Use the [Insurance Certificate to Contract: Status is greater than or equal to Active and Company matches](#) search, and choose all records.

TB: Handle Insurance Certificate Expiration (disabled)

Purpose: This rule checks for expired insurance certificates and then updates the certificate's [Status](#). If the related contract is still valid, the Contract Owner is notified of the expired certificate.

Runs: Every two days at 1:30 AM

Search Filter: Valid Certificates expiring TODAY

Priority: 1

Action:

I: Handles Certs Expiring TODAY

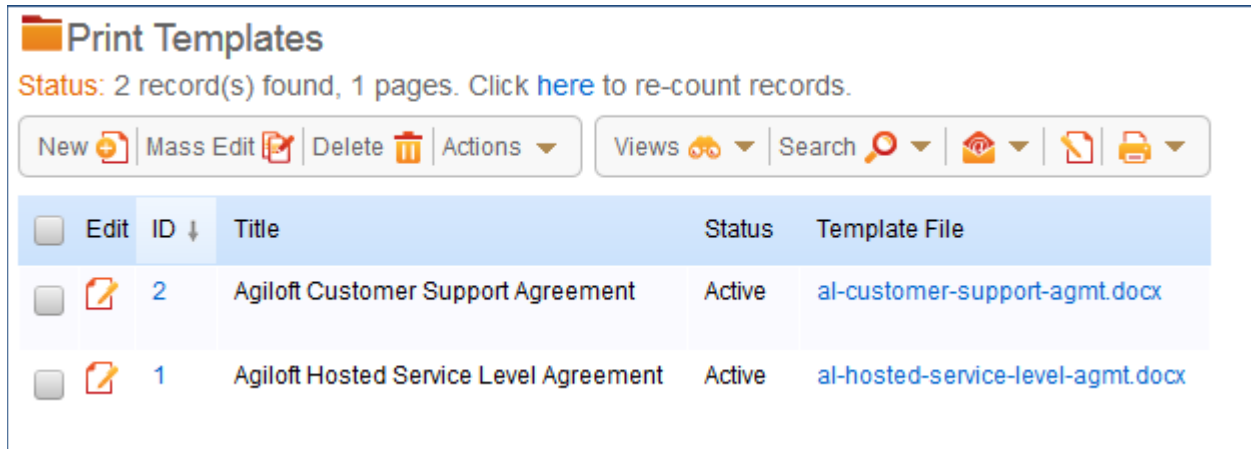
```
if (Contract Status='Active') {
  Set Status to Expired
  Email Contract Owner of Expired Certificate
} else {
  Set Status to Inactive
}
```

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.



<input type="checkbox"/>	Edit	ID ↓	Title	Status	Template File
<input type="checkbox"/>		2	Agiloft Customer Support Agreement	Active	al-customer-support-agmt.docx
<input type="checkbox"/>		1	Agiloft Hosted Service Level Agreement	Active	al-hosted-service-level-agmt.docx

Figure 53. 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: When edited 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.

The screenshot shows a web-based form for an 'Approval' record. At the top, there are tabs for 'Details', 'Related Approvals', 'Emails', and 'History'. The 'Details' tab is active. The form contains the following fields and sections:

- ID:** 377
- Contract ID:** 347
- Status:** Pending Approval (dropdown menu)
- Approval Title:** Department Head Review
- Action Buttons:** Approve, Require Changes, Permanently Reject
- Approval Details:**
 - *Related To: Contracts (dropdown)
 - *Step Number: 1 (input field)
 - *Approval Team: Support Manager Team (dropdown)
 - Approver: Ralph Knowles (dropdown)
- Approval Notes:** A large text area for notes.
- Approval Running Notes:** A section for running notes.
- All Contract Approval Notes:** A section for all contract approval notes.
- Attachments:** A section for attachments.
- Approval Packet Files:** A section for approval packet files.
- Contract Details:**
 - Contract Company Name: Xerox
 - Contract Manager: Agiloft System
 - Contract Title: Copier installation and maintenance
 - Contract Description: Vendor will install and maintain 2 multi-function copy machines in Agiloft offices.
 - Contract Start Date: Mar 16 2015
 - Contract Amount: \$20,000

Figure 54. 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.

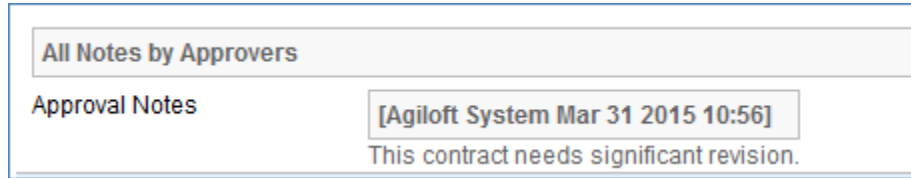


Figure 55. Notes from all approvers are stored in the [Approval Notes](#) field.

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.

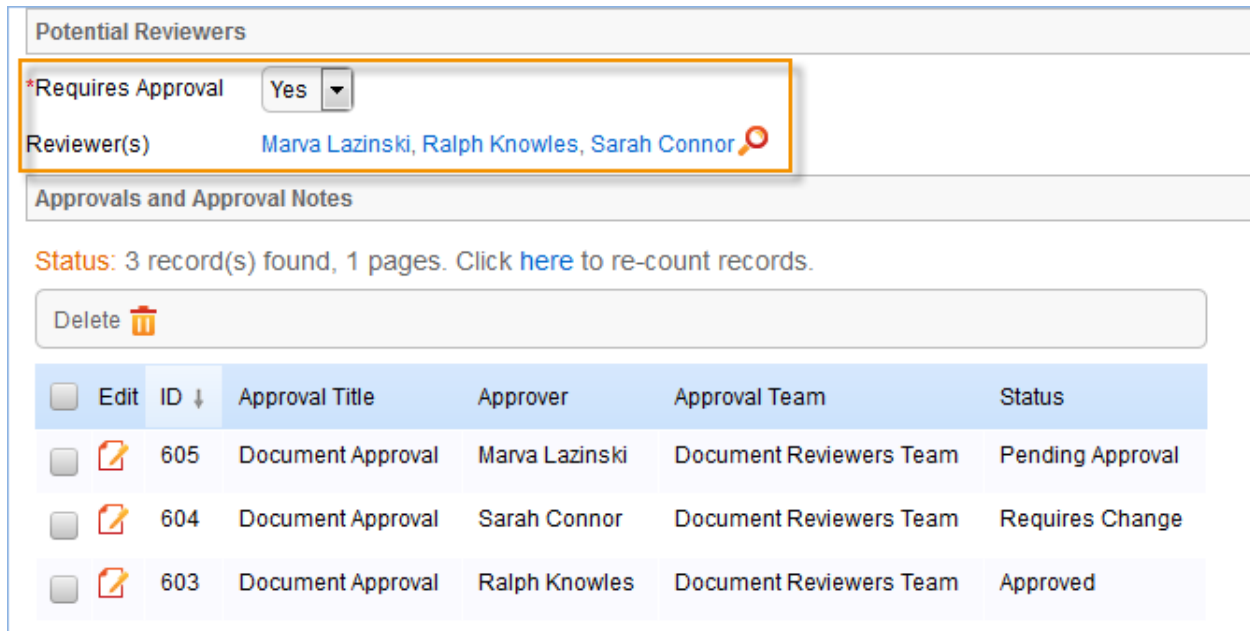


Figure 56. Choose the document reviewers before generating approvals.

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 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.

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](#).

The screenshot shows a web form for an Approval Template record. At the top, there is a title 'Approval Template' with a person icon. Below the title are buttons for 'Save', 'Cancel', 'Details', 'Related Records', and 'History'. The form fields are as follows:

ID	100	Status	Active
*Approval Title	Finance Approval for Software		
Workflow Title	IT and Finance Sequential Approval for Software Licenses		
Approval Details			
Approval Usage	Required	*Step Number	2
*Assign Approval Based On	Fields in Approval Template		
*Approval Team	Finance Team	Approver	

Figure 57. Sample approval template record form.

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.						
<input type="checkbox"/> Edit	ID	Step Number ↑	Approval Title	Approval Team	Assign To	Approval Usage
<input type="checkbox"/>	7	2	Legal Team Approval	Legal Team		Required
<input type="checkbox"/>	9	3	Compliance Team Approval	Compliance Team		Required
<input type="checkbox"/>	6	4	Risk Team Approval	Risk Team		Required

Figure 58. 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.

The screenshot shows a form field labeled "*Assign Approval Based On" with a dropdown menu set to "Person from Contract". To the right is an "Assign To" dropdown menu which is open, showing a list of options: "Contract Department Head", "Contract Owner", "Contract Requester", "Internal Contract Signer", and "Requester Manager". Below the dropdowns are "Save" and "Cancel" buttons with small dropdown arrows, and a double arrow navigation button.

Figure 59. 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 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

! 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.

Workflow

Save Cancel Workflow History << >>

ID 2 *Status Active

*Used in Contracts *Workflow Title 4 sequential: Dept head, finance, (compliance), legal

Contract Types Goods and Services, Non-Disclosure Agreement, Other, Partner Agreement, Parts only Contract, Product Support and Upgrades, Service Contract, Software License, Subscription Service

Clone Workflow

Workflow Details

Notes

All Approval Templates

Status: 4 record(s) found, 1 pages. Click [here](#) to re-count records.

New Delete Increase Step Number by 1 Decrease Step Number by 1 Unlink Views

Edit	ID	Step Number ↑	Approval Title	Approval Team	Assign To	Approval Usage
	10	1	Department Head Review	Contract Manager Team	Contract Department Head	Required
	11	2	Finance Team Review	Finance Team		Required
	12	3	Compliance Team Review	Compliance Team		Conditional
	13	4	Legal Review	Legal Team		Required

Number of Approvals 4 Calculate

Save Cancel << >>

Figure 60. 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.

Contract Task

Save Cancel

Task Details Emails History

ID: 4

*Task Title: Follow up on Approval Status by Phone

Assigned Team: Contract Owner Team | Assigned Person: Jared Smith

Task Details

Status: Done | Task Type: General Task

Date Due: Mar 17 2015 16:00 | Advance Notification Date: Mar 13 2015 | Days to Send Reminder: 7

Description: Contact vendor with updates on the contract approval's expected timeline.

Contract Details

Contract ID: _____

Contract Owner: _____ | Contract Requester: _____

Contract Status: _____

Save Cancel

Figure 61. 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 [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 [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

Updated Field: Date of Last Reminder

Updated Value: NOW() (formula)

U: Set Date of Next Reminder

Updated Field: Date of Next Reminder

Updated Value: NOW() + \$days_to_send_reminder days (formula)

PROJECT MANAGEMENT TABLES

Projects 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.

Project

Save Cancel Project Details Tasks Contact Information Time / Billing Emails History

Project Manager Sarah Connor Status Work In Progress ID 118

Project Category Client-Related *Project Type Client Professional Services

*Project Name Set up system for new customer: Agiloft

*Company Agiloft

Project Details

Project CCs Estimated Hours

*Project Description Install and customize our system for Agiloft.

Internal Project Notes

Next Milestone Date Target Completion Date

Attached Documents Attach/Manage Attached Contract Attach/Manage

No Files Attached No Files Attached

Contract Approved by Customer Yes No Date Contract Approved

Save Cancel << >>

Figure 62. 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: This rule prevents changing the project **Status** to Completed if Tasks are still open. It creates the Default Tasks when the **Status** changes to Work in Progress. When a project is canceled, this rule cancels the associated Tasks.

Runs: When edited by web.

Search Filter: None

Priority: 2

Actions:

I: All edit validation actions

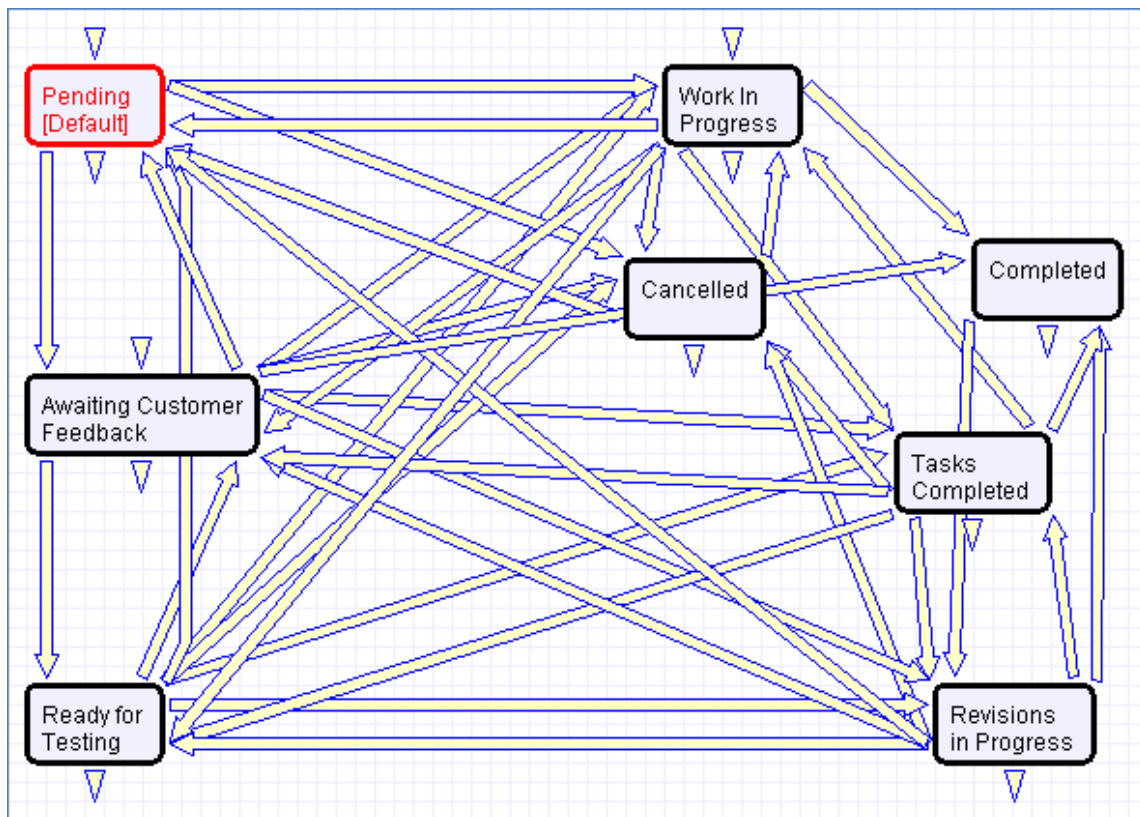
```
if (Status changed from: any value to: any of 'Completed','Tasks Completed' last user's modification and Number of Open  
Tasks>=1) {  
    can't complete with open tasks  
}
```

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  
}
```

Workflow

The Projects table has the following default workflow:



Reports

The Projects table includes the following default Charts / Reports:

Charts/Reports							
Status: 6 record(s) found, 1 pages. Click here to re-count records.							
New Copy Delete				Views			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report	
<input type="checkbox"/>	Active Customer Projects by Target Completion Date	Active Customer Projects	Yes	Jan 13 2014 09:43	Graphical chart, HTML	Standard	
<input type="checkbox"/>	Active Customer Projects: Runtime Target Completion Date Range	Active Customer Projects -Run time Target Completion Date Range	Yes	Jan 13 2014 10:12	Graphical chart, HTML	Standard	
<input type="checkbox"/>	Active Internal Projects by Target Completion Date	Active Internal Projects	Yes	Jan 13 2014 09:54	Graphical chart, HTML	Standard	
<input type="checkbox"/>	Active Internal Projects: Runtime Target Completion Date Range	Active Internal Projects -Run time Target Completion Date Range	Yes	Jan 13 2014 11:13	Graphical chart, HTML	Standard	
<input type="checkbox"/>	Customer Projects by Status	Customer Projects (category is client related)	Yes	Jan 15 2014 16:27	Graphical chart, HTML	Standard	
<input type="checkbox"/>	Internal Projects by Type of Project	Internal Projects	Yes	Jan 15 2014 16:26	Graphical chart, HTML	Standard	

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.

Project Type

Save ▾
Cancel ▾
Project Type
Task Templates
History
<< >>

ID 9

Status Active ▾ *Project Category Internal ▾

*Project Type Employee Termination

Save ▾
Cancel ▾
<< >>

Figure 63. 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.

Members of the Project Manager, Marketing, Sales, Sales Manager and Admin groups may create and edit records. Support Staff may view all PO records only.

Purchase Order

Save Cancel PO Details Emails History

Project Name: Vet system Company: ConAgra Foods

Authorized/Purchased By: Dr Shanna Smith Date Authorized: [Calendar Icon]

PO Number: 100002 Status: In Progress

PO is for: Initial spec development

Work Description: Design a system to track client animal care, immunization and hospitalization records.

Attached File: Attach/Manage No Files Attached

Hours: 10 Rate: \$ 200

Calculate Value: Calculate Value Total Value: \$ 2,000

Save Cancel

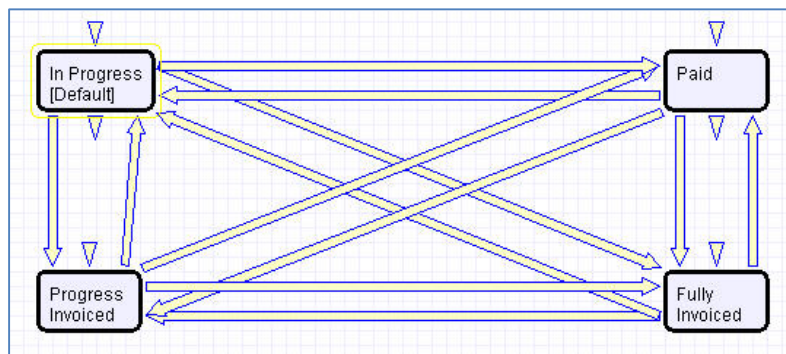
Figure 64. Sample Purchase Order record.

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:



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.

The screenshot shows a web-based form for a 'Time Entry' record. At the top, there's a title 'Time Entry' with a clock icon. Below the title is a navigation bar with buttons for 'Save', 'Cancel', 'Time Detail', 'Related Record', 'Emails', and 'History'. The main form area shows the record ID '119' and a 'Related To' dropdown menu set to 'Choose one'. Under the 'Time Details' section, there are fields for '*Time Spent' (with 'H' and 'M' input boxes), 'Hours Spent', 'Done On' (set to 'Jan 23 2014' with a calendar icon), and 'Done By' (set to 'Agiloft Admin'). A large text area for '*Work Description' is present but empty. The bottom of the form has 'Save' and 'Cancel' buttons and navigation arrows.

Figure 65. 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    			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>  	Billable hours by assignee in the last month		Yes	Jul 02 2013 08:01	Graphical chart	
<input type="checkbox"/>  	Hours records by project		Yes		Graphical chart	
<input type="checkbox"/>  	Last month's Invoicing summary		Yes	Jul 02 2013 08:01	Graphical chart	
<input type="checkbox"/>  	Time records by employee	not customer	Yes	Jul 02 2013 08:03	Graphical chart, HTML	
<input type="checkbox"/>  	Total Billable Hours by Assignee		Yes	Jul 02 2013 08:02	Graphical chart	
<input type="checkbox"/>  	Total Hours by assignee		Yes	Jul 02 2013 08:03	Graphical chart	
<input type="checkbox"/>  	Total Hours by project		Yes	Jul 02 2013 08:04	Graphical chart	
<input type="checkbox"/>  	Total Non-billable Hours by Assignee		Yes		Graphical chart	
<input type="checkbox"/>  	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.

The screenshot shows a web-based form for a 'Billing' record. At the top left is a dollar sign icon and the word 'Billing'. Below this are 'Save' and 'Cancel' buttons. A navigation bar contains 'Billing Hours', 'History', and 'Communications' tabs, with 'Billing Hours' selected. To the right of the tabs are icons for print, home, and a calendar. The main form area includes: 'Done on' (Jun 11, 2010), 'Done By' (EW Admin), a text area for '*Work description' containing 'did more work on this problem today and spent a lot of time doing such and such and such and such and such and such', 'Billable hours' (4) and 'Non Billable hours' (empty) input fields, 'Date Created' (Jun 11 2010 10:48) and 'Created By' (EW Admin), 'Date Updated' (Jun 11 2010 10:48) and 'Updated By' (System). At the bottom are another 'Save' and 'Cancel' button and navigation arrows.

Figure 66. 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.

🔥

Lead

Save ▾
Cancel ▾
Contact Information
Progress
Background
Emails
History
⏪ ⏩

Changing the status to Converted will bring up a dialogue allowing you to convert the lead.

ID 17 Status Uncontacted ▾

Assigned Team Sales Team ▾ Sales Rep Jack Richards ▾

Contact Information

First Name <input style="width: 90%;" type="text" value="Margery"/>	Last Name <input style="width: 90%;" type="text" value="Woodson"/>
Title <input style="width: 90%;" type="text" value="VP of Development"/>	Contact Roles <input style="width: 90%;" type="text" value="🔍"/>
Direct Phone <input style="width: 40%;" type="text" value="123-033-4444"/> Ext. <input style="width: 10%;" type="text"/>	Cell Phone <input style="width: 90%;" type="text"/>
Email <input style="width: 90%;" type="text" value="margery@example.com"/>	Email Opt Out <input type="checkbox"/> Do not email me

Company Information

*Company Name <input style="width: 90%;" type="text" value="AT&T"/>	Company Role Prospect ▾
Company Telephone <input style="width: 40%;" type="text" value="1-888-944-0447"/> Ext. <input style="width: 10%;" type="text"/>	Company Fax <input style="width: 90%;" type="text" value="333111111"/>
*Location Type Headquarters 🔍	*Location Name <input style="width: 90%;" type="text" value="AT&T"/>
Street Address <input style="width: 90%;" type="text" value="32 Avenue of the Americas"/>	City <input style="width: 90%;" type="text" value="New York"/>
Country USA ▾	Zip or Postal Code <input style="width: 90%;" type="text" value="10013-2412"/>
US State NY ▾	
Company Website <input style="width: 90%;" type="text"/>	
Region Western US ▾	Industry Computer Hardware ▾
Map it	Find local hotels
Campaign Name Trade Show ▾	

Save ▾
Cancel ▾
⏪ ⏩

Figure 67. Sample lead record.

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

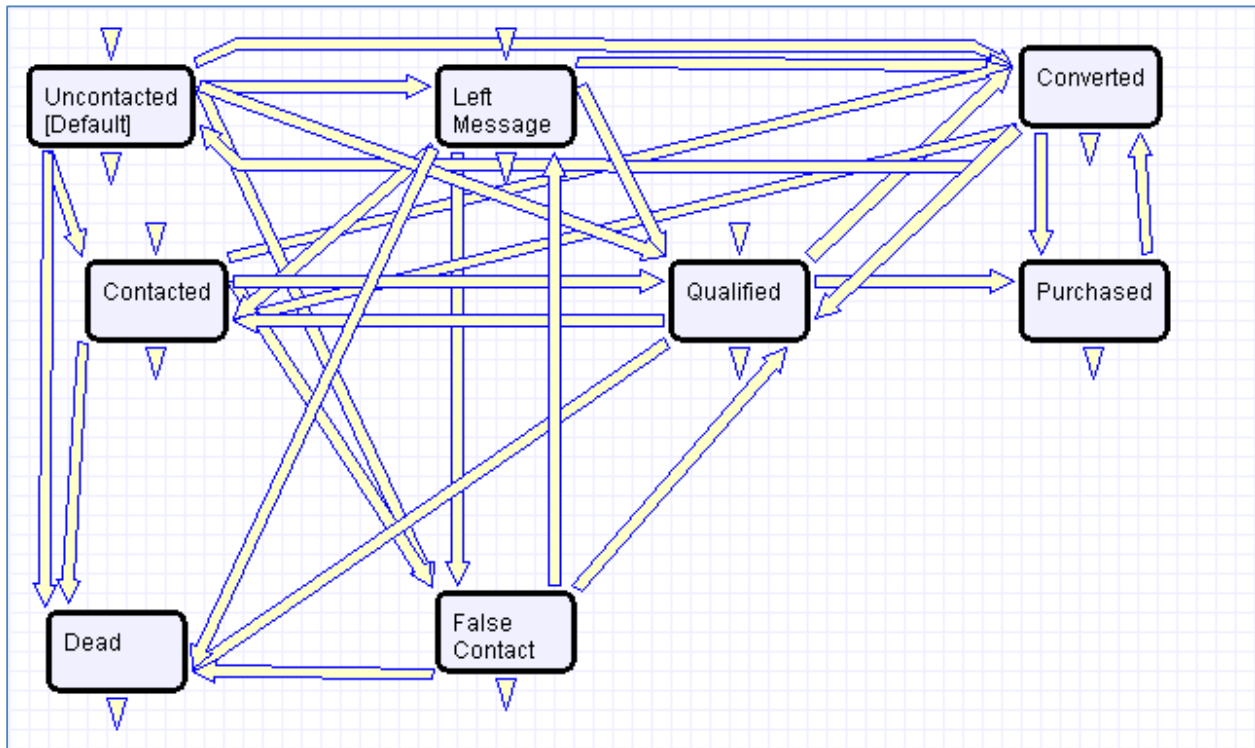
Actions:

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    			
<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format
<input type="checkbox"/>	 	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
<input type="checkbox"/>	 	All Leads by Sales Rep Pie Chart and report showing status		No	Nov 03 2010 12:22	Graphical chart, HTML
<input type="checkbox"/>	 	All Leads by Sales Rep Segmented Bar showing Status		No	Nov 03 2010 12:24	Graphical chart, HTML
<input type="checkbox"/>	 	Funnel for all sales	Status is active, not yet converted	Yes	Mar 14 2011 14:29	Graphical chart, HTML
<input type="checkbox"/>	 	Leads by Campaign		No		Graphical chart, HTML
<input type="checkbox"/>	 	Leads by Campaign segmented by Status		No	Nov 03 2010 12:20	Graphical chart, HTML
<input type="checkbox"/>	 	Leads Converted to Opportunities by Campaign	Converted Leads	No	Feb 14 2011 17:01	Graphical chart, HTML
<input type="checkbox"/>	 	My Funnel	All Leads assigned to me	Yes		Graphical chart, HTML
<input type="checkbox"/>	 	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
<input type="checkbox"/>	 	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.

The screenshot shows a CRM interface for an Opportunity record. At the top, there's a header with the 'Opportunity' logo and navigation tabs: 'Save', 'Cancel', 'Deal Info' (selected), 'Related Records', 'Account Info', 'Emails', and 'History'. Below the header, the record details are as follows:

- *Opportunity Name:** Apple IT upgrade (ID: 119)
- *Company:** Apple
- Main Contact:** Cathy Dupont
- Sales Rep:** Jane Barrows
- Status:** Qualified

The 'Opportunity Information' section contains:

- Rating:** Hot
- Products of Interest:** Agiloft License for Linux
- Sale Value:** \$ 75,000
- Probability of sale:** 40 %
- Estimated Close Date:** Feb 01 2013
- Attached Contract or PO:** Attach/Manage (No Files Attached)
- Main Contact Email:** c.dupont@apple.com
- Main Contact Phone:** 408-965-9333:412

The 'Action Information' section includes:

- Actions Taken:** Confirmed Available Budget
- Next Action:** Schedule Presentation or site visit
- Next Action Due:** Jan 04 2013 09:00
- Sales Notes:** [EW System Feb 01 2011 15:30] contact them to arrange a custom sales demo

At the bottom, there are 'Save' and 'Cancel' buttons and navigation arrows.

Figure 68. 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

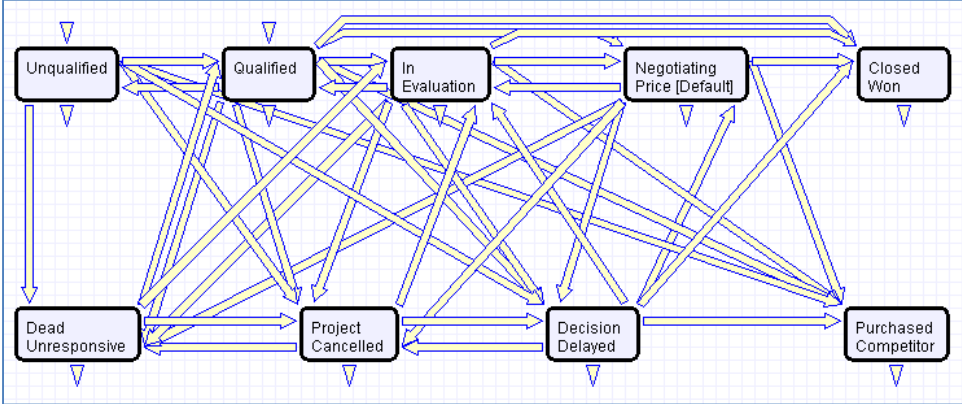
Actions:

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:



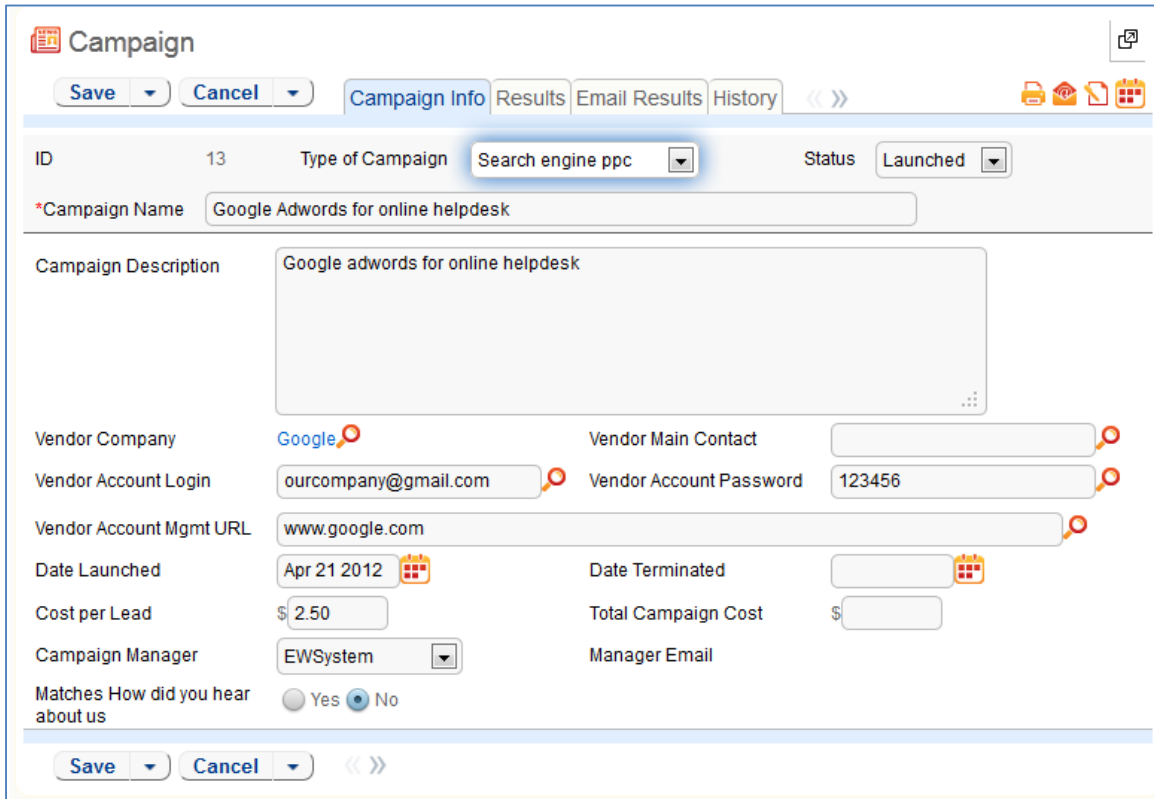
Reports

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

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.



The screenshot shows a web form for editing a campaign record. At the top, there's a title 'Campaign' and navigation tabs: 'Campaign Info' (selected), 'Results', 'Email Results', and 'History'. Below the tabs are 'Save' and 'Cancel' buttons. The form fields include: ID (13), Type of Campaign (Search engine ppc), Status (Launched), Campaign Name (Google Adwords for online helpdesk), Campaign Description (Google adwords for online helpdesk), Vendor Company (Google), Vendor Account Login (ourcompany@gmail.com), Vendor Account Mgmt URL (www.google.com), Date Launched (Apr 21 2012), Cost per Lead (\$ 2.50), Campaign Manager (EWSYSTEM), and Matches How did you hear about us (No). There are also fields for Vendor Main Contact, Vendor Account Password (123456), Date Terminated, and Total Campaign Cost.

Figure 69. A sample 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:

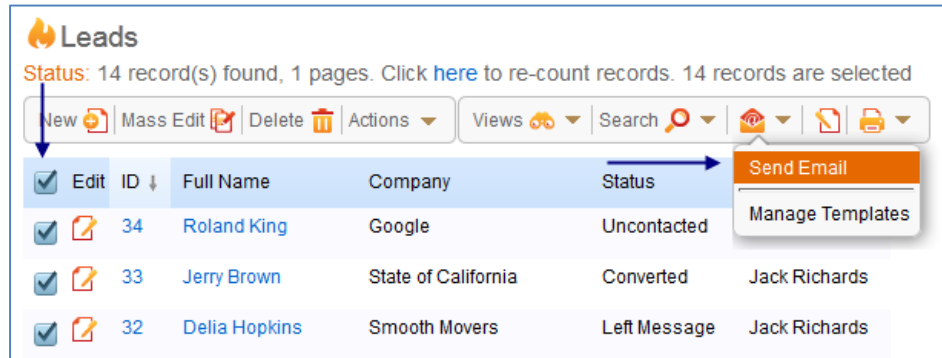


Figure 70. Sending email to multiple leads.

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:

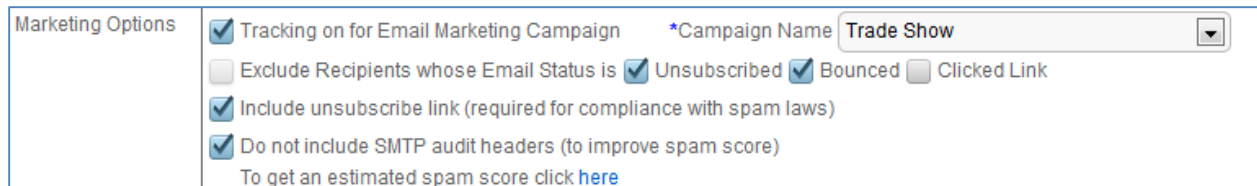


Figure 71. Options for email marketing campaigns.

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:

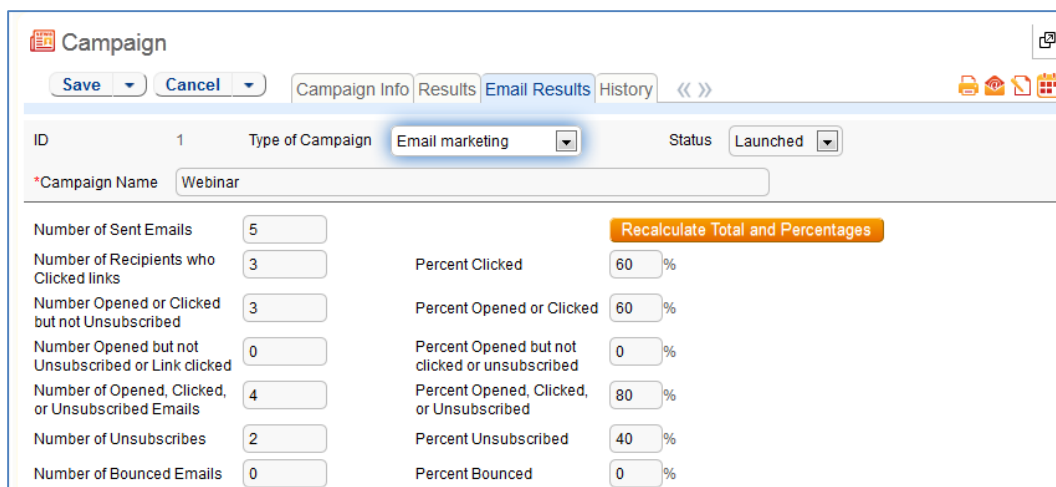


Figure 72. Email marketing campaign results.

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:

Edit	ID ↓	URL Clicked	Contact Name	Email Recipient Lead Name	Email Linked Record Hotlink
<input type="checkbox"/>	7	http://www.cnn.com	Chris Connoly		contacts/384
<input type="checkbox"/>	6	http://www.cnn.com			contacts/384
<input type="checkbox"/>	5	http://www.enterprisewizard.com			lead2/31
<input type="checkbox"/>	4	http://www.enterprisewizard.com			

Total Number of Clicks 4

Figure 73. Embedded table of clicked links records.

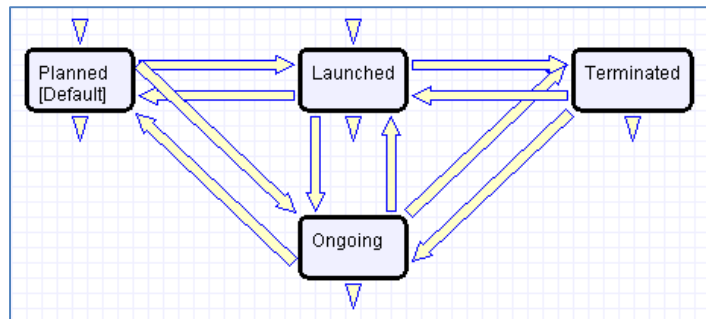
Further documentation about how the email campaign statistics are created and how to set up this functionality or modify it is available in our release note documentation at <http://www.agiloft.com/documentation/email-marketing.pdf> . This functionality can easily be turned on for additional custom tables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

Ownership

Campaign records owned by the user who creates them.

Workflow

The Campaigns table has the following default workflow:



Reports

The Campaigns 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

<input type="checkbox"/>	Edit View	Title ↑	Filter	Published	Date Updated	Output Format
<input type="checkbox"/>		Results for All Active Campaigns	F: Not Terminated	Yes	Feb 16 2011 19:16	Graphical chart, HTML
<input type="checkbox"/>		Value of Orders by Type of Campaign		Yes	Feb 16 2011 19:15	Graphical chart, HTML, Excel

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.

Email Click

[Edit](#) [Close](#) [Click Information](#) [History](#) << >>

ID	7		
URL Clicked	http://www.cnn.com		
Linked Email ID	72	Campaign ID	1
Campaign Name	Webinar	Source Record Table	Contact
Date Created	Feb 14 2012 15:31	Email Linked Table	
Email To	bridget@enterprisewizard.com		
Email Recipient Lead Name		Email Recipient Lead Phone	
Contact Name	Chris Connoly	Contact Company	NewsWire
Contact Phone	123-444-5555:213		

[Edit](#) [Close](#) << >>

Figure 74. Sample clicked link 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			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>	All Clicks by Campaign then URL		No	Jun 19 2012 15:48	Graphical chart, HTML	
<input type="checkbox"/>	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.

Quote

Save Cancel Sales Info **Quote** Emails History << >>

ID 32 Quote Prepared By Jack Richards

Quote Number 1345-2 Quote Expires On Aug 16 2012

Expected Order Date Aug 12 2012 Status Signed and Accepted

Quoted Items

Click New to add items to the quote. Each item you add will create a Products Quoted record. The list of items is drawn from the Products table.
 Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.

New Unlink Views

Edit	ID ↓	Item Number	Item Name	Number of Units	Unit Price	Total Price	Taxable
<input type="checkbox"/>	49	32423j2w63	Socket wrench 33mm	100	5.99	\$599.00	Yes

SubTotal of All Items \$599.00 Taxable Subtotal \$599.00 **Calculate**

Tax Rate 0 %

Additional Discount Given Yes No **Calculate Totals**

Discounted Total Before Taxes \$ 1,549.00 Sales Tax \$ 0.00

Total with Tax and Discounts \$ 1,549.00

Attached Quote PDF **Attach/Manage**
1. 32_1345-2_IBM.pdf

Save Cancel << >>

Figure 75. 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

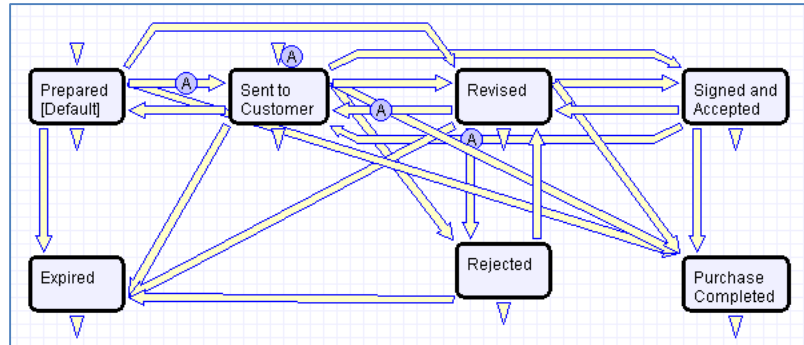
If the record is created and the **Status** is Prepared, the status can be changed to any one of the following states: Sent to customer, Expired, Revised, and Purchase Completed. If the status is changed to Sent to Customer at any time, a quote with the attached PDF will be emailed to the prospect.

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:

Charts/Reports						
Status: 7 record(s) found, 1 pages. Click here to re-count records.						
New Copy Delete			Views			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>	Completed Purchases in Past Year	C: Purchased Quotes	Yes	Jul 01 2013 14:14	Graphical chart, HTML	
<input type="checkbox"/>	Forecast 6 months, bar for each rep	Quotes expected to close in next 6 month chart	No	Jul 02 2013 07:44	Graphical chart, HTML	
<input type="checkbox"/>	Forecast 6 months, runtime by rep	C: Runtime by employee quotes due in next 6 months	No	Jul 02 2013 07:48	Graphical chart, HTML	
<input type="checkbox"/>	Open Quotes value by Company	C: Quote status is not Rejected or Purchased	Yes	Jul 01 2013 14:18	Graphical chart, HTML	
<input type="checkbox"/>	Open Quotes Value by Sales Rep	C: Quote status is not Rejected or Purchased	Yes	Jul 01 2013 14:19	Graphical chart, HTML	
<input type="checkbox"/>	Open Quotes Value by Status	C: Quote status is not Rejected or Purchased	Yes	Jul 01 2013 14:19	Graphical chart, HTML	
<input type="checkbox"/>	Purchases Completed Last Month	C: Purchased last calendar month	No	Jul 01 2013 14:20	Graphical chart, HTML	

Products Quoted Tables

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

The screenshot shows a 'Product Quoted' record form. At the top, there are tabs for 'Details', 'Quote Details', 'History', and 'Emails'. Below the tabs, the form displays the following information:

- ID:** 49
- Quote Number:** 1345-2
- Order Status:** Signed and Accepted
- Quote Prepared by:** Jack Richards
- Quote Expires On:** Aug 16 2012
- Date of Purchase:** (empty)
- Item Name:** Socket wrench 33mm (dropdown menu)
- Item ID:** 32423j2w63
- Item Type:** Part (selected), Software, Service
- Description:** A wrench with 33mm size head.
- Type of Unit:** Quantity
- Unit Value:** Piece
- Number of Units:** 100
- Unit Price:** 5.99
- Discount Given:** Yes (unselected), No (selected)
- Calculate Total:** (button)
- Total Price:** \$ 599.00
- Taxable:** Yes

At the bottom of the form, there are 'Save' and 'Cancel' buttons, and navigation arrows.

Figure 76. 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:

Charts/Reports




Status: 5 record(s) found, 1 pages. Click [here](#) to re-count records.

New 	Copy 	Delete 	Views   			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>  	Forecast of Parts Needed by month for 6 months for accepted quotes	c:quote accepted close within 6 months and parts	Yes	Jul 01 2013 12:23	Graphical chart, HTML	
<input type="checkbox"/>  	Forecast of Parts Needed in next 6 months	c:quote accepted close within 6 months and parts	Yes	Jul 01 2013 12:20	Graphical chart, HTML	
<input type="checkbox"/>  	Pie Chart showing Total Revenues per Product	C: Order Status is Purchase Completed	Yes	Jul 01 2013 12:17	Graphical chart, HTML	
<input type="checkbox"/>  	Value of Completed Orders per month for past 12 months	c: Products purchased in last 12 months	Yes	Jul 01 2013 12:18	Graphical chart, HTML	
<input type="checkbox"/>  	Value of Completed Orders per Product for past 6 months	C: Products purchased in last 6 months	Yes	Jul 01 2013 12:18	Graphical chart, HTML	

Products Table

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

Product

Details Orders Emails History << >>   

ID: 4

Status: Active Inactive *Product Type: Part Software Service

Product Number: msbolt33-124

*Product Name: Micro-seal bolt 33mm

Description: A bolt used in small components of towers.

Type of Unit: Quantity Unit Value: Choose one

Price per Unit: \$ 2.00 Taxable: Yes No

Background:

Date Created: Apr 06 2010 11:54 Created By: EW Admin

Date Updated: Mar 17 2012 09:43 Updated By: System

<< >>

Figure 77. 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:

Charts/Reports						
Status: 3 record(s) found, 1 pages. Click here to re-count records.						
New  Copy  Delete 			Views    			
<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	
<input type="checkbox"/>	  Completed Sales by Product Type	C: Some units were sold	Yes	Oct 15 2010 17:18	Graphical chart, HTML	
<input type="checkbox"/>	  Potential Sales by Product Type	C: Some potential orders exist	Yes	Oct 15 2010 17:18	Graphical chart, HTML	
<input type="checkbox"/>	  Sales Totals by Product	C: Some units were sold	No		Graphical chart, HTML	

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 then 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.

The screenshot shows a document management interface. At the top, there's a 'Document' header with a document icon. Below it are tabs for 'Save', 'Cancel', 'Details', 'Progress', 'Emails', and 'History'. The document details include: ID 10, Status 'Pending Review', Title 'How do new employees login to our network?', Assigned Team 'Document Management Team', and Assigned Person 'Paula Ling'. At the bottom, there are three orange buttons: 'Return to Submitter', 'Submit for Approval', and 'Publish without Approval'.

Figure 78. 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.

The screenshot shows the 'Potential Reviewers' section. It includes a '*Requires Approval' dropdown menu set to 'Yes'. Below it is the 'Reviewer(s)' field with the text 'Agiloft Admin, Agiloft System, Ralph Knowles'. A red magnifying glass icon is positioned over the field, and a tooltip with the text 'Click to select values' is visible. Below the field is a section titled 'Approvals and Approval Notes'.

Figure 79. 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

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](#).

Document

Save
Cancel
Details
Progress
Emails
History
« »

ID	10	Status	Pending Approval
*Title	How do new employees login to our network?		
Assigned Team		Assigned Person	Chris Connolly

Document Details

Document Type	FAQ	Document Subtype	Choose one
For Department	HR	Department Manager	Paula Ling
Priority	High	Rush	No
Purpose	For new employees to help them work until they have been set up.		
Description	This FAQ explains the process to login as a guest user until your employee login has been created.		
	<input type="button" value="Edit"/> <input type="radio"/> HTML <input checked="" type="radio"/> plain text		
Document Access	All Internal Users	Audience	<input type="checkbox"/> Customers <input type="checkbox"/> Partners <input type="checkbox"/> Prospects <input checked="" type="checkbox"/> Employees <input type="checkbox"/> Vendors <input type="checkbox"/> Executives <input type="checkbox"/> Media <input type="checkbox"/> Analysts

Document Files

Source Files	Published Files
<input type="button" value="Attach/Manage"/> No Files Attached	<input type="button" value="Attach/Manage"/> No Files Attached
Published Format	PDF
Internal File URL	

Related Documents

Related Document(s)

Submitter Information

Submitter	Submitter Department
Mia Lazano	HR

Figure 80. 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

Sent To: Submitter

Template Name: Your Document Requires and Update

L: Set Document Rejected field to Yes in linked Approvals

Chain: Document ← Approvals through fields: Document ID, Document Title, etc.

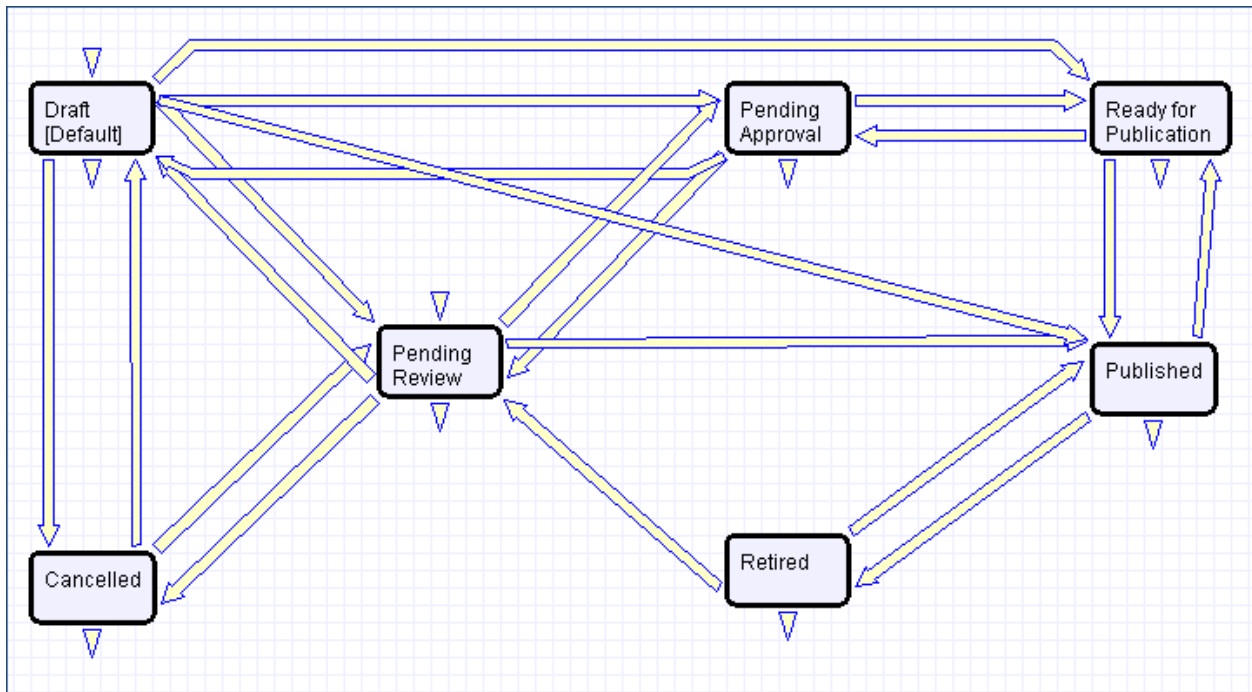
U: Set Document Rejected to Yes

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:

Charts/Reports
 Status: 6 record(s) found, 1 pages. Click [here](#) to re-count records.

New Copy Delete

Views

<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>		Active documents by type	Active documents	Yes	Feb 17 2011 14:57	Graphical chart	Standard
<input type="checkbox"/>		Approval required	C: Requires approval	Yes		Graphical chart, HTML	Standard
<input type="checkbox"/>		Cancelled in past year	Cancelled	No	Mar 14 2014 15:55	Graphical chart, HTML	Standard
<input type="checkbox"/>		Created in past 6 months		Yes	Feb 17 2011 14:37	Graphical chart, HTML	Standard
<input type="checkbox"/>		Documents by Status		Yes	Feb 17 2011 14:37	Graphical chart, HTML	Standard
<input type="checkbox"/>		Documents Published Last Month	C: Published Last Month	Yes		Graphical chart, HTML	Standard

DOCUSIGN TABLES

Overview

[DocuSign](#) 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 at www.docusign.com 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>. To learn more about how to set up and deploy the Agiloft integration with DocuSign, go to the Agiloft *DocuSign Users Manual* here: <http://www.agiloft.com/documentation/docusign-users-manual.pdf>.

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>. 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 button 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**:

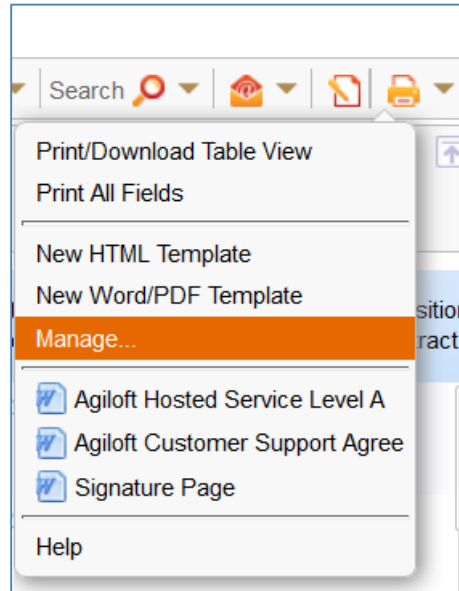


Figure 81. Mouse-over the printer icon to manage templates.

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:

DocuSign User

Save Cancel DocuSign User <>

*Login dsides *Full Name Dennis Sides

DocuSign User Name (Email) dennis.sides@agiloft Access Granted No

DocuSign Password

User must be authorized to send envelopes/documents. If you are self-registering, please type in your DocuSign User Name (Email) and Password (it won't be stored locally) to grant access. If you are DocuSign Account Administrator you can grant access to other users by typing in their User Name/Email and leaving the password field blank.

Grant Access to DocuSign

Save Cancel <>

Figure 82. 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:

Status: DocuSign User #5 successfully created..

DocuSign User

Edit Close DocuSign User <>

*Login cmerritt *Full Name Craig Merritt

DocuSign User Name (Email) craig.merritt@agiloft.com Access Granted Yes

Revoke Access

Edit Close <>

Figure 83. A DocuSign user with access granted.

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

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 be 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.

DocuSign Envelope

Save Cancel Envelope Status << >>

Create & Preview Send Discard

Envelope 6e079346-1a78-4aa2-ab18-6a083af30014 Status Created

Linked Record contract/238 *Sender Dennis Sides

*Subject Your signature is needed for contract: ABC Electronics Support Ren...

Attached Documents Attach/Manage

1. ABC_Electronics-238-rev2.docx

Recipients

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

New Mass Edit Delete

Views Search

Edit	ID ↓	Send Order	Status	Full Name	Email	Title	Role Name	Message	Envelope
<input type="checkbox"/>	21	2	Draft	Sandy Johnson	ewemtestuse r8@gmail.com	Contract Administrator	Customer2	Please sign the contract when you are ready.	6e079346-1a78-4aa2-ab18-6a083af300...
<input type="checkbox"/>	20	2	Draft	John Conrad	ewemtestuse r9@gmail.com	Sales Manager	Customer1	Please sign the contract when you are ready.	6e079346-1a78-4aa2-ab18-6a083af300...
<input type="checkbox"/>	19	1	Draft	Dennis Sides	dennis.sides@agiloft.com		InternalSigner	Please sign this contract then it will be sent to the...	6e079346-1a78-4aa2-ab18-6a083af300...

Figure 84. 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.

DocuSign Recipient

Save Cancel Recipient Status << >>

Status Draft

*Send Order Envelope

*Full Name *Email

Title *Role Name

*Role

Access Code

Message

Figure 85. 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

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.

The screenshot shows a web-based form for an 'Agiloft Request'. At the top, there are navigation buttons: 'Save', 'Cancel', 'Details', 'Emails', and 'History'. The form contains the following fields and values:

- ID:** 1
- *Type of Request:** Question about functionality
- Assigned To:** Agiloft Implementation Team
- Status:** Assigned
- Priority:** Medium
- Admin Only:** No
- *Table Name:** Support Cases
- *Summary:** how do we do something
- *Details/Steps to Reproduce:** Here are the steps.
- Attached Files:** No Files Attached
- *Email Behavior:** Send automatic emails
- Submitter Information:**
 - Submitter Name:** EWSystem
 - Submitter Team:** Admin Team
 - Submitter Email:** (empty)
 - Submitter Phone:** 415-232-4444
- Additional CCs:** (empty)

Figure 86. Sample Agiloft Request record.

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:

!: 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

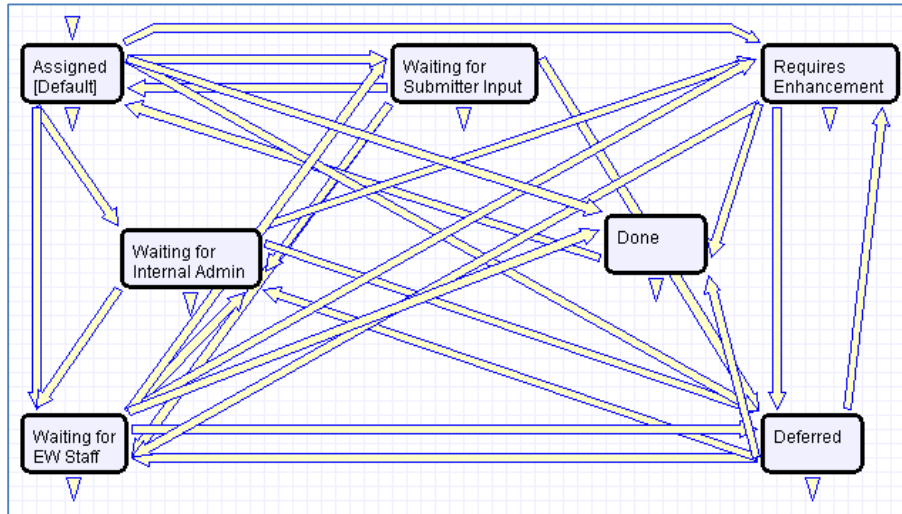
Actions:

U: Set Email behavior to send emails

Updated Field: Email Behavior

Updated Value: Send automatic emails

Workflow



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 87. 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.

The screenshot shows a web form titled "Replacement Variable". At the top, there are "Save" and "Cancel" buttons with dropdown arrows, followed by "Details" and "History" tabs, and navigation arrows. On the right, there are icons for print, refresh, and a calendar. The form fields include: "ID" with value "6", "Status" with a dropdown menu set to "Active", "Used in Field" with a dropdown menu set to "Approval Assigned To", and "List Value" with a text input field containing "Contract Owner". Below these is a section titled "Variable Details" with a "Variable" text input field containing "\$contract_id.internal_contract_owner" and a "Formula Help" button. At the bottom, there are "Save" and "Cancel" buttons with dropdown arrows, and navigation arrows.

Figure 88. Sample Replacement Variable record.

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 show 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, `$contract_id.requester_name` finds the name of the Requester in the linked Contract record, while `$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](#) and [HANDLING APPROVALS](#) sections), 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.

The screenshot shows a 'Task' record form. At the top, there is a 'Task' title and a navigation bar with tabs: 'Task Details', 'Related Info', 'Time Spent', 'Emails', and 'History'. Below the navigation bar, the form contains the following fields and controls:

- ID: 163
- *Related To: Project
- *Title: Assign Implementers and Trainers
- Assigned Team: Project Manager Team
- Assigned Person: Sarah Connor
- Status: Incomplete
- Task Type: Task
- Date Due: [Calendar icon]
- Date Done: [Calendar icon]
- Description: [Text area]
- Attached File: Attach/Manage (button), No Files Attached (text)
- Working Notes: [Text area]

At the bottom of the form, there are 'Save' and 'Cancel' buttons and navigation arrows.

Figure 89. 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.) 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

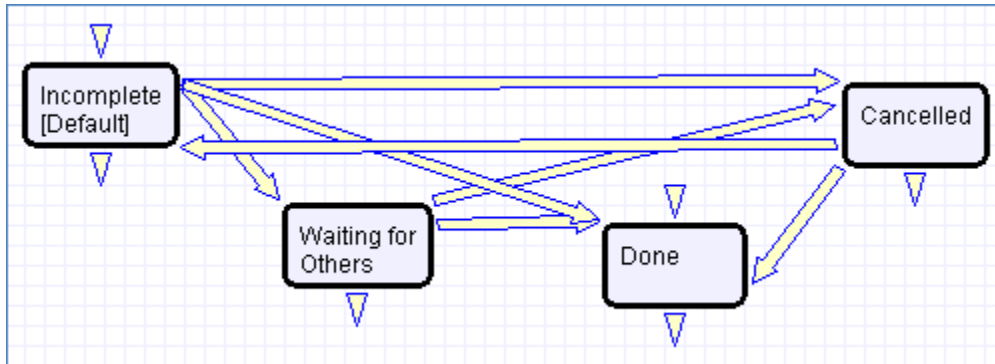
Actions:

U: Set closing information

Updated Fields: Date Done; Status

Updated Values: \$date_scheduled; Done

Workflow



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			
<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>				Yes	Jan 12 2014 15:06	Graphical chart, HTML	Standard
<input type="checkbox"/>				Yes	Feb 26 2014 13:44	Graphical chart	Standard
<input type="checkbox"/>			Closed Tasks	Yes		Graphical chart	Standard
<input type="checkbox"/>			Open Project Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
<input type="checkbox"/>			Open Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
<input type="checkbox"/>				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.

The screenshot shows a web-based form for editing a Task Template. At the top, there's a title 'Task Template' and navigation tabs: 'Template Details' (selected), 'Related Record', and 'History'. Below the tabs are 'Save' and 'Cancel' buttons. The form fields include: ID (85), Related To (Project), Template Status (Active/Inactive), *Task Title (Do initial survey of potential products), Number of Working Hours to Due Date (18), Project Type (New Product Acquisition), *Required or Optional (Required), Assign Task Based On (Project Manager), Task Type (Task), Preceding Template ID, and Preceding Template Name. There is also a Description field and an Attached File section with an 'Attach/Manage' button and 'No Files Attached' text. The form has 'Save' and 'Cancel' buttons at the bottom.

Figure 90. Default tab of 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.

The screenshot shows a web-based form titled "Survey". At the top, there are tabs for "Questions", "Numbers", "Related Records", "Emails", and "History". The "Questions" tab is active. Below the tabs, there are fields for "ID" (18), "Survey Type" (Helpdesk Case), "Submitter Name" (Jack Richards), and "Submitter Company" (EnterpriseWizard). The form contains four radio button questions:

- *Timeliness of Support: Excellent Very Good Good Fair Poor
- *How would you rate the knowledge of our support staff: Excellent Very Good Good Fair Poor
- *Rate the overall quality of the support you received: Excellent Very Good Good Fair Poor
- *Rate your overall satisfaction with the support experience: Very Satisfied Somewhat Satisfied Neutral Somewhat Dissatisfied Very Dissatisfied

Below the questions is a text area labeled "Please provide any suggestions". At the bottom of the form, there are "Save" and "Cancel" buttons.

Figure 91. Sample Survey record.

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 92. Send surveys by email with a hyperlink to open the survey.

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:

I: All create actions

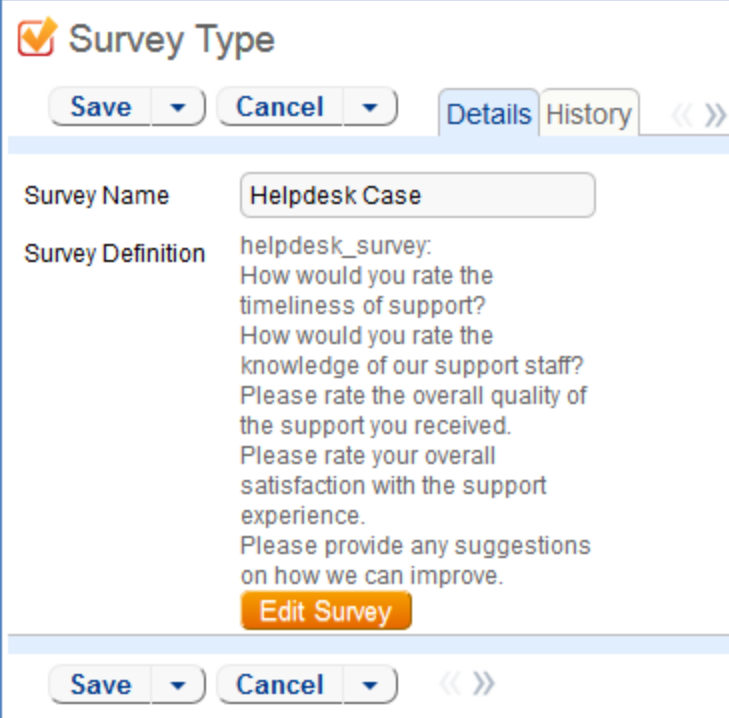
```
if (Survey Type='Support Case') {  
  Set Submitter Name from Support Submitter  
} else if (Survey Type='Helpdesk Case') {  
  Set Submitter name from HC submitter
```

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.



The screenshot shows a web interface for editing a 'Survey Type' record. At the top, there is a title 'Survey Type' with a checkmark icon. Below the title are two buttons: 'Save' and 'Cancel', each with a dropdown arrow. To the right of these buttons are tabs for 'Details' and 'History', followed by navigation arrows '<<' and '>>'. The main content area is divided into two sections. The first section is labeled 'Survey Name' and contains a text input field with the value 'Helpdesk Case'. The second section is labeled 'Survey Definition' and contains a text area with the following text: 'helpdesk_survey: How would you rate the timeliness of support? How would you rate the knowledge of our support staff? Please rate the overall quality of the support you received. Please rate your overall satisfaction with the support experience. Please provide any suggestions on how we can improve.' Below the text area is an orange button labeled 'Edit Survey'. At the bottom of the form, there are two buttons: 'Save' and 'Cancel', each with a dropdown arrow, and navigation arrows '<<' and '>>'.

Figure 93. Survey Type records define the questions used in a survey.

Use Case

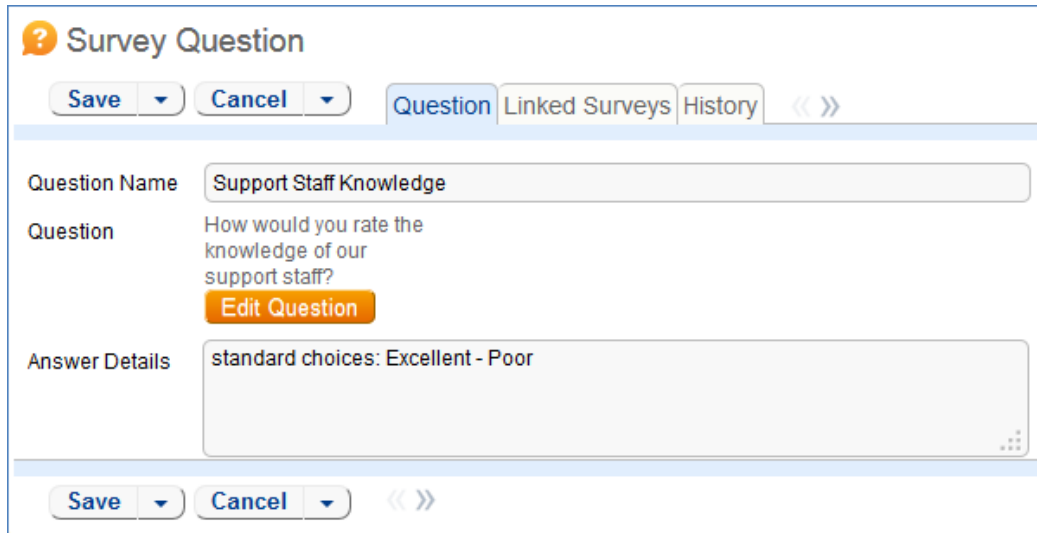
The Survey Types table is a special table used in the Survey table. Records in this table display Survey Types as templates for Surveys. Each template contains a number of Survey Questions and relationships between those questions that describe whether they are required as well as any dependencies on other questions.

Ownership

Records in this table are owned by the person who submits them.

Survey Questions Table

This table is used to generate and store the questions that are to be pulled into Survey Types.



The screenshot shows a web form titled "Survey Question" with a question mark icon. At the top, there are "Save" and "Cancel" buttons with dropdown arrows, and a navigation bar with tabs for "Question", "Linked Surveys", and "History", along with left and right arrow icons. The form contains three main sections: "Question Name" with a text input field containing "Support Staff Knowledge"; "Question" with a text area containing "How would you rate the knowledge of our support staff?" and an orange "Edit Question" button; and "Answer Details" with a text area containing "standard choices: Excellent - Poor". At the bottom, there are another "Save" and "Cancel" buttons with dropdown arrows, and left and right arrow icons.

Figure 94. 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 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.

Activity Log			
Edit		Close	
General		»»	
Id	5468	Rule Id	82
User Information			
User Login	system	User Name	System
Company	EnterpriseWizard	User Primary Team	Admin Team
Groups	admin, adminimport	IP	66.26.252.66
Action Information			
Date	Feb 25 2013 06:47	Action	Login
Description	system	Interface	Staff
Table Label		Record Id	
Session Id	26366	Session duration	0 days 2 hours 0 minutes 13 seconds
Action Duration		Cookie	-194102663
Edit		Close	
»»			

Figure 95. 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:

Charts/Reports

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

New Copy Delete Views

<input type="checkbox"/>	Edit View	Title ↑	Published	Filter	
<input type="checkbox"/>			All Logins	Yes	Login actions

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.

All Communications

Status: More than 45 record(s) found. Click [here](#) to count records..

Page: [First](#) [Back](#) [Page 3] [Next](#) [Last](#) Go to page [Go](#)

New Reply Reply to all Forward Delete Mass Edit Actions

Views Search

<input type="checkbox"/>	ID ↓	From	Subject	Created On
<input type="checkbox"/>	85	demo@agiloft.com	Contract 67 for IBM has been rejected and set back to Draft Status	Jun 11 2013 07:16
<input type="checkbox"/>	84	youremail@agiloft.com	Support Case #424 requires your attention	Jun 10 2013 07:22
<input type="checkbox"/>	83	youremail@agiloft.com	Support Case #424 requires your attention	Jun 10 2013 07:18
<input type="checkbox"/>	82	youremail@agiloft.com	Customer has updated Case #424	Jun 10 2013 06:59
<input type="checkbox"/>	81	youremail@agiloft.com	Support Case #424 requires your attention	Jun 10 2013 06:56
<input type="checkbox"/>	80	youremail@agiloft.com	Customer has updated Case #424	Jun 10 2013 06:53
<input type="checkbox"/>	79	youremail@agiloft.com	Support Case #424 requires your attention	Jun 10 2013 06:49
<input type="checkbox"/>	78	demo@agiloft.com	People Email Template	Jun 07 2013 12:01
<input type="checkbox"/>	77	youremail@agiloft.com	Your support case #405 has been resolved	Jun 07 2013 11:43
<input type="checkbox"/>	76	demo@agiloft.com	Leads Email Template	Jun 07 2013 11:38

Figure 96. The All Communications table holds a record for all emails sent to or from the system.

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.

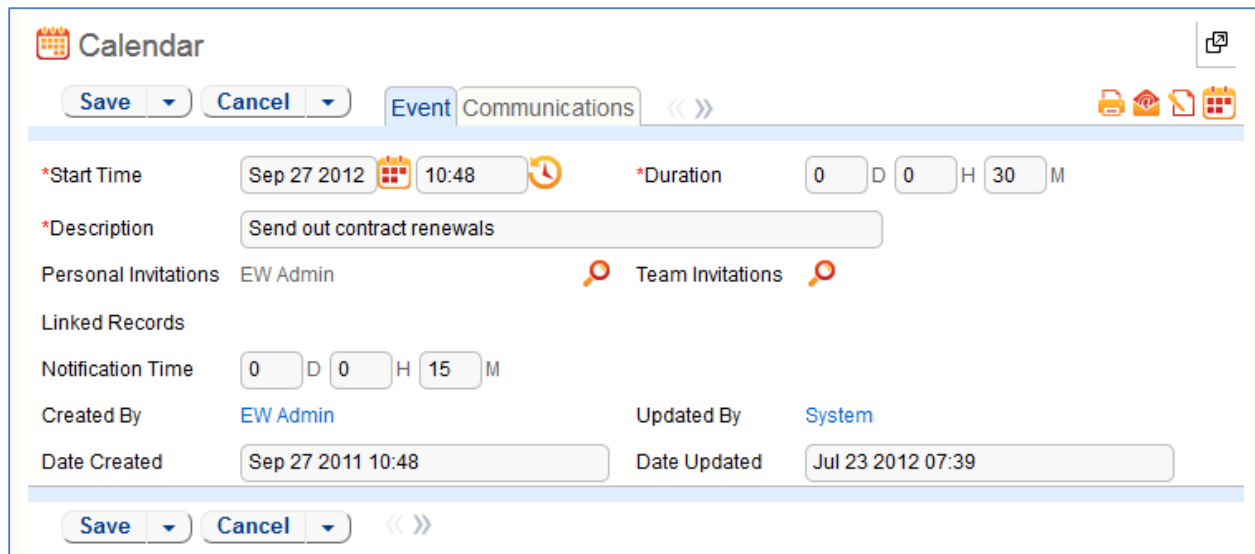
When viewing communications in this interface, users who are senders or receivers of these emails may see communications that were sent from other tables, such as a support case, a change request, users, and so on. Users can reply to or forward these emails directly from the All Communications table 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.



The screenshot displays the 'Calendar' tool interface. At the top, there is a 'Calendar' title with a calendar icon and a 'Save' button. Below the title, there are 'Save' and 'Cancel' buttons, followed by a tab labeled 'Event Communications' and navigation arrows. The main form contains the following fields:

- *Start Time:** Sep 27 2012 10:48 (with a clock icon)
- *Duration:** 0 D 0 H 30 M
- *Description:** Send out contract renewals
- Personal Invitations:** EW Admin
- Team Invitations:** (with a magnifying glass icon)
- Linked Records:** (empty)
- Notification Time:** 0 D 0 H 15 M
- Created By:** EW Admin
- Updated By:** System
- Date Created:** Sep 27 2011 10:48
- Date Updated:** Jul 23 2012 07:39

At the bottom, there are 'Save' and 'Cancel' buttons and navigation arrows.

Figure 97. 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.

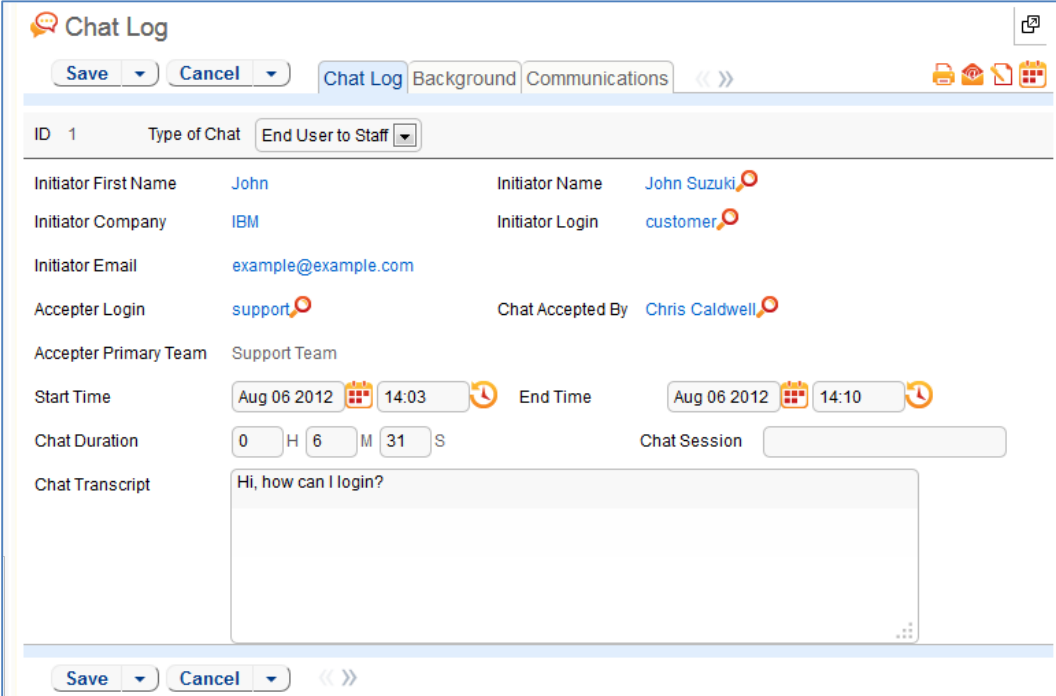
The Calendar pane is only available to staff users, and cannot be made available to end users.

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.



The screenshot shows the 'Chat Log' form in a system interface. At the top, there are navigation buttons: 'Save', 'Cancel', and 'Chat Log' (highlighted), along with 'Background' and 'Communications' tabs. Below this is a header row with 'ID 1' and a dropdown menu for 'Type of Chat' set to 'End User to Staff'. The main form area contains several fields: 'Initiator First Name' (John), 'Initiator Company' (IBM), 'Initiator Email' (example@example.com), 'Initiator Name' (John Suzuki), 'Initiator Login' (customer), 'Acceptor Login' (support), 'Chat Accepted By' (Chris Caldwell), and 'Acceptor Primary Team' (Support Team). There are also time-related fields: 'Start Time' (Aug 06 2012 14:03) and 'End Time' (Aug 06 2012 14:10), both with calendar and clock icons. Below these is a 'Chat Duration' field showing 0 H, 6 M, and 31 S, and a 'Chat Session' field. The 'Chat Transcript' field contains the text 'Hi, how can I login?'. At the bottom, there are 'Save' and 'Cancel' buttons and navigation arrows.

Figure 98. 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 Acceptor Login field.

EUI Templates Table

This table contains the HTML files used in creating a customized End User Interface.

EUI Templates
 Status: 36 record(s) found, 1 pages. Click [here](#) to re-count records.

Views

<input type="checkbox"/>	Edit	ID ↓	Name	Description
<input type="checkbox"/>		42	repair-search.htm	Search form for the support cases table
<input type="checkbox"/>		41	my_repairs.htm	shows my support cases
<input type="checkbox"/>		40	newrepair.htm	Submit a new support case
<input type="checkbox"/>		39	newuser.htm	Submit a new user
<input type="checkbox"/>		38	translation_zh.properties	中文资源包 - note: when adding new properties or modifying this record, the changes will only take effect if the server cache is cleared!!!!
<input type="checkbox"/>		37	translation_ru.properties	localization file for Russian - note: when adding new properties or modifying this record, the changes will only take effect if the server cache is cleared!!!!
<input type="checkbox"/>		36	translation.properties	localization file for English - note: when adding new properties or modifying this record, the changes will only take effect if the server cache is cleared!!!!

Figure 99. EUI Template records hold the HTML 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".
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.
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.
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.

Table	Show Toolbar Tab	Details
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.
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.
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.

Table	Show Toolbar Tab	Details
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.
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.

Table	Show Toolbar Tab	Details
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.

Table	Show Toolbar Tab	Details
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.
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.

Table	Show Toolbar Tab	Details
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.
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.

Table	Show Toolbar Tab	Details
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.

Table	Show Toolbar Tab	Details
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.
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.

Table	Show Toolbar Tab	Details
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.
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.

Table	Show Toolbar Tab	Details
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.
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.

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.
Documents	No	Can view only those that satisfy the saved search "Public Access".

Table	Show Toolbar Tab	Details
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.