



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

[Project Management Tables](#).

Need a Sales CRM system to manage new leads, opportunities, quotes, and assess marketing campaign results? Look at the [Sales CRM Tables](#).

View the [Contract Management Tables](#) or [Document Management Tables](#) section to find out more about the pre-built contract and document management functionality in the Demo KB.

STAFF AND END USER TERMINOLOGY

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

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

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

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

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

GROUPS AND TEAMS

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

Users in Agiloft belong simultaneously to both **groups** and **teams**. A user can belong to multiple groups and to a primary team with additional teams. A user's access to the system – the tables and tabs he

sees, the records he sees, the fields he sees, the records he can create and edit, and the menu actions he can perform - depends on his group memberships. Group permissions are additive so users in multiple groups will receive the union of the all the group permissions. While you can create as many groups as you need, it is preferable from a maintenance perspective to keep the number of groups small.

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

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

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

GROUPS

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

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

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

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

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

TEAMS

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

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

Users can be members of multiple teams. Their team membership is defined in their user record and is contained in two fields. The **Primary Team** field holds a single team, used to determine which Look & Feel scheme they see, and their default view of each table. The **Teams** field is a multi-choice field that

should include their Primary team and any additional teams to which they belong. The **Teams** field is used as the filter for the Assigned inbox, for email notifications, and so on.

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

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

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

Project Manager Team	Members of this team are assigned to projects.
Repair Team	Default team assigned to new repairs.
Risk Team	Risk Team for contract approval and review.
Sales Manager Team	Sales Managers.
Sales Team	For members of the Sales department.
Support Manager Team	Support Managers.
Support Team	For members of the Support department.
System Admin Team	System Administration team.
Vendor Team	Team for end users who are specifically Vendors in the system.

TABLE STRUCTURE AND TERMINOLOGY

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

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

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

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

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

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

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

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

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

Each table may also have a **Workflow**, which defines state transitions for a process and specifies which transitions are possible from any other state. This determines the visible choices in a special "Workflow

State" field. These transitions may run stored actions, such as sending an email from a saved Email Template, or trigger a rule that automatically updates a field.

ADMIN SETUP MENU ITEMS

LICENSES

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

ACCESS

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

IMPORT/EXPORT

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

SYNC

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

SYSTEM

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

LOCALIZATION

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

END USER INTERFACE

Users accessing the system through an unlimited End User license are taken to a customizable End User Interface (EUI), a simplified interface with fewer options than the Staff Interface. The default EUI is

HTML-based and can be modified through the out-of-the-box HTML templates provided in the EUI Templates table (see [EUI Templates Table](#) later in this document).

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

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



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

Default EUI Setup

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

Groups	Default EUI Tabs
Guest	FAQs (Support Cases) Submit a Case (new Support Case) New User
Internal Customer	FAQs (Helpdesk Cases) Submit a Case (new Helpdesk Case) My Cases (Helpdesk)

	My Profile
Document Creator	FAQs (Documents) Submit a Document My Documents My Profile
Contract Creator	Submit a Contract (new Contract) All Contracts My Contracts My Profile
Repair Customer	FAQs (Support Case) Submit a Repair Request My Repair Requests My Profile

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

Legacy EUI Setup

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

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

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

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

CUSTOM LOOK & FEEL SCHEMES

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

DEMO KNOWLEDGEBASE TABLES

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

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

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

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

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

BACKGROUND TABLES

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

The background tables are detailed below.

PEOPLE TABLE, AND EMPLOYEE/EXTERNAL USER SUB-TABLES

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

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

USE CASE

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

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

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

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

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

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

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

OWNERSHIP

Records in this table are owned by an individual.

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

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

REPORTS

The People table contains the following default Charts/Reports:



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 stored in the system. The information stored typically includes the company name, company address, and any contact information for the Company.

Company

Key Info
Locations and Contacts
Sales Info
Account Info
Related Information
Emails
History

ID	1	*Status	Active <input type="button" value="v"/>
*Company Name	<input type="text" value="Agiloft"/>	Parent Company	<input type="text" value=""/> <input type="button" value="O"/>

Key Company Information

*Primary Role	Internal <input type="button" value="v"/>	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="button" value="Choose one"/> <input type="button" value="v"/>	Annual Revenue	\$ <input type="text" value=""/>
Company Website	<input type="text" value="www.agiloft.com"/>		
Ongoing Notes	<div styleborder="1px solid #ccc; height: 40px; width: 100%;"></div>		

Account Rep Information

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

USE CASE

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

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

OWNERSHIP

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

REPORTS

The Companies table contains the following default Charts/Reports:

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.

Location

Save ▾
Cancel ▾

Location Details
Contacts
Emails
History
« »

ID 1

Company Name Adobe 🔍

Primary Role Manufacturer ▾ 🔍

*Location Name Adobe West Coast

*Location Type Campus 🔍

Street Address

Street Address 1234 West Main Street

City Carlsbad

Zip or Postal Code 95424

Telephone 430-323-8088 Ext.

Country USA ▾

US State CA ▾

Fax 434-656-9878

Map It

Find Local Hotels
Find Local Hotels

Save ▾
Cancel ▾

« »

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](#).

OWNERSHIP

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

SERVICE DESK OPERATION TABLES

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

- Service Desk and Change Management Tables
- Asset Management Tables
- Repair Requests Tables

SERVICE DESK AND CHANGE MANAGEMENT TABLES

SUPPORT CASES TABLE

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

The screenshot shows a web-based form for creating or editing a support case. At the top, there's a header "Support Case" with a search icon. Below it are navigation tabs: "Details" (selected), "Working", "Related Records", "Contract", "Time", "Emails", and "History". There are also icons for printing, refreshing, and deleting. The form fields are as follows:

- ID:** 406
- Status:** Open (dropdown menu)
- Assign to Me:** Button
- Assigned Team:** Support Manager Team (dropdown menu)
- Assigned Person:** Ralph Knowles (dropdown menu)
- Contact Information:**
 - *Customer Name: Weston Presley (text input)
 - User Company: Acme Micro (text input)
 - Customer Phone: 123-444-4444 (text input)
 - Ext.: (text input)
 - Cell Phone: (text input)
 - *Customer Email: example41@acme.com (text input)
 - Customer Login: (text input)
- Supported User:** (text input)
- Problem Description:**
 - Type of Issue: Question (dropdown menu)
 - Priority: Critical (dropdown menu)
 - *Summary: SQL Server query (text input)
 - 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? (text area)
- Inbound Attachments:** Attach/Manage (button), No Files Attached (text input)

At the bottom, there are "Save" and "Cancel" buttons with dropdown arrows, and navigation arrows.

USE CASE

End User Record Submission

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

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

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

Technician Record Submission

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

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

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

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

Processing of Records

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

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

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

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

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

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

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

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

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

OWNERSHIP

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

AUTOMATION

Create: New support case actions

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

Runs: When created by web, email or API.

Search filter: None.

Priority: 1

Actions:

I: Email Assigned team or person of new case

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

Edit: All customer update actions

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

Runs: When edited by web or email.

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

Priority: 2

Actions:

I: Customer Update Ticket Actions

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

U: Change Status to Reopened

Updated Fields: Status

Updated Value: Reopened

U: Set State to Updated by Customer

Updated Field: Status

Updated Value: Updated by Customer

Edit: All edit actions done by staff users

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

Runs: When edited by web or email.

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

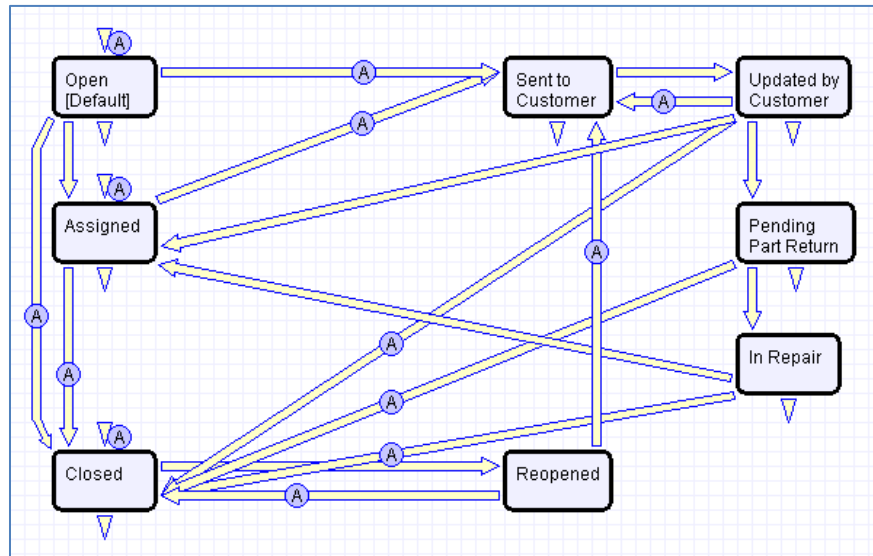
Priority: 1

Actions:

I: All edit actions by staff no api

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

WORKFLOW



WORKFLOW AUTOMATION

E: Customer Acknowledgement Email

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

E: Email customer when closed on creation

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

E: Email customer that input is needed



















































Notes: This email is sent when the status changes from any [Status](#) to Sent to Customer.

E: Closing email to customer

Notes: This email is sent when the status changes from any [Status](#) to Closed.

REPORTS

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

Charts/Reports					
Status: 20 record(s) found, 1 pages. Click here to re-count records.					
New  Copy  Delete 			Views    		
<input type="checkbox"/>	Edit 	View 	Title 	Published	Filter
<input type="checkbox"/>			All Cases by Priority Funnel	Yes	
<input type="checkbox"/>			All cases by Workflow State / Priority	Yes	
<input type="checkbox"/>			All cases segmented by Type of Issue / Priority	Yes	
<input type="checkbox"/>			All Cases. Pie chart by Type of Issue	Yes	
<input type="checkbox"/>			Average elapsed time to close by Closed By person	No	All Closed Cases
<input type="checkbox"/>			Average elapsed time to close for each month of past year	Yes	C: Date Closed in Past Year
<input type="checkbox"/>			Average time spent by staff to resolve Cases by Type of Issue	Yes	
<input type="checkbox"/>			Cases closed each month of past year by Type of Issue	Yes	C: Date Closed in Past Year
<input type="checkbox"/>			Gauges of open Cases by Priority	Yes	Not Closed
<input type="checkbox"/>			My Assigned open Cases by Priority, funnel chart	Yes	My Assigned
<input type="checkbox"/>			Number of Cases closed by Person by Priority	No	All Closed Cases
<input type="checkbox"/>			Number of Cases closed each month of past year by Closed By	No	C: Date Closed in Past Year
<input type="checkbox"/>			Number of Cases created each month of past year	Yes	C: Date Created in past year
<input type="checkbox"/>			Number of Cases created in past 3 months segmented by Week / Priority	Yes	
<input type="checkbox"/>			Number of Cases created in past month by day/ Priority	Yes	Created in past month
<input type="checkbox"/>			Open Cases by Assigned Person / Priority	No	Not Closed
<input type="checkbox"/>			Reopened Cases for past year by Assigned To	No	C: Status changed to reopened in last 12 months
<input type="checkbox"/>			Summary of Support Case activity	Yes	
<input type="checkbox"/>			Trend of Cases. Segmented by Type of Issue	Yes	
<input type="checkbox"/>			Trend of Support Cases submitted per month for past 6 months. Segmented by Type of Issue	Yes	

HELPDESK CASES TABLE

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

The screenshot displays the 'Helpdesk Case' form with the following details:

- Case Header:** ID 42, Status Closed, Priority Medium, Assigned Team Support Team, Assigned Person Chris Caldwell.
- User Information:** Submitter Name Hector Gomez, Submitter Login internal, Submitter Phone 333-333-5555:102, Submitter Email sample@example.com, Submitter Cell Phone, Submitter Department Finance.
- Case Information:** *Type of Problem Internet Connection, Subtype of Problem Can't connect, Related to an Asset Yes (selected), Asset Type dropdown menu open showing options: Communication, Computer, Computer Peripheral, Data Center, Imaging/Printing, Video Conferencing. Asset Subtype and Asset Owner Name fields are also present.
- Summary:** *Summary company internet, Problem Description field.
- Attachments:** Inbound Attached Files, Attach/Manage button, No Files Attached.

USE CASE

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

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

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

If a selection of “Software” and a [Subtype of Problem](#) of anything other than “Other” is chosen, a filtered list of available applications becomes visible.

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

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

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

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

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

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

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

Processing of Records

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

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

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

If the submitter updates the record at any point, an email notifies the [Assigned Person](#) of the update.

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

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

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

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

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

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

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

No escalation rules are set up by default.

OWNERSHIP

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

AUTOMATION

Create: All creation actions

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

Runs: When created by web, email or API.

Search filter: None

Priority: 2

Actions:

I: All create actions

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

I: Trigger Creation of Tasks from Template

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

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

Edit: All actions when updated by staff members

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

Runs: When edited by web or email.

Search filter: R: Updater not customer

Priority: 2

Actions:

I: Edit actions by staff

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

I: Trigger New Task Creation

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

Edit: Task Updates made by API

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

Runs: When edited by API.

Search filter: R: Updater not customer

Priority: 12

Actions:

I: Task Completion Actions

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

Edit: Actions when end user updates

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

Runs: When edited by email or web.

Search filter: Updated by customer

Priority: 1

Actions:

I: End User Update Actions

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

Edit: All Validation Rules

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

Runs: When edited by web.

Search filter: None

Priority: 5

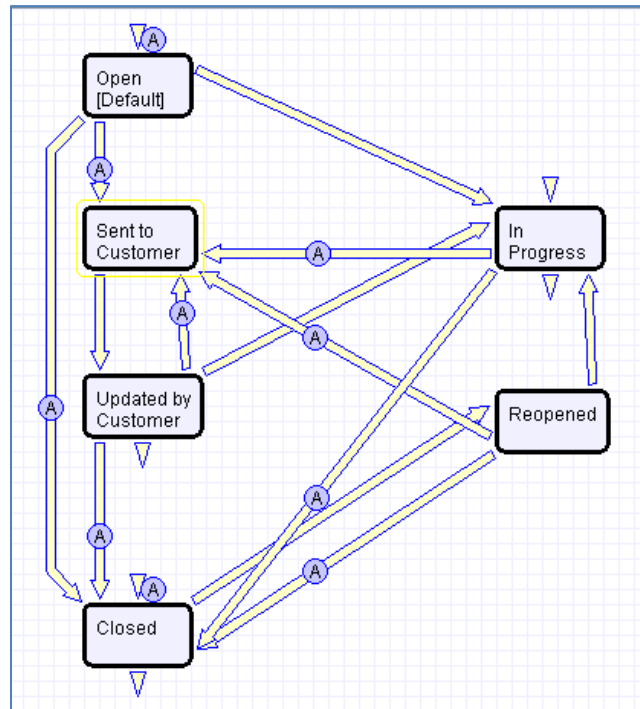
Actions:

I: All Validation Actions

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

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

WORKFLOW



WORKFLOW AUTOMATION

E: Email Customer Acknowledgement

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

E: Email customer created as closed

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

E: Email Customer Need Information

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

E: Send closing email to customer

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

REPORTS

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

Charts/Reports

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

New  Copy  Delete 

Views    

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

CHANGE REQUESTS TABLE

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

USE CASE

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

Change Request

Save
Cancel
Details
Approvals and Work
Related Records
Time
Emails
History

ID: 9

Assigned Team: Support Team

Status: Approved

Time Description:

Urgency: Normal Emergency

Assigned Person:

Time Spent: H M

Request Information

*Change Category: Problem Ticket

*Risk if Done: Low

*Related to: Helpdesk Case

*Risk if Not Done: High

Asset Information

Asset Name:

Asset Type:

Asset Ownership:

Asset Description:

Asset Manufacturer:

Asset Subtype:

Request Details

Requested Date of Completion: May 14 2010 00:00

*Change Summary: Purchase and set up new laptop for user

Change Description: My laptop seems to be broken. I think I need a new one.

Business Justification:

Backout Plan:

Attached Files: Attach/Manage
No Files Attached

Estimated Time to Complete:

Requester Information

*Requester: EW Admin

*Requester Phone:

*Requester Email:

*Requester Manager:

Save
Cancel
<>

Technician Record Submission

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

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

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

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

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

End User Record Submission

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

Approvals

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

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

OWNERSHIP

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

AUTOMATION

Create: All creation actions

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

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

I: Conditional Creation Actions

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

Edit - All staff edit actions by user no api

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

Runs: When edited by web or email.

Search filter: None

Priority: 2

Actions:

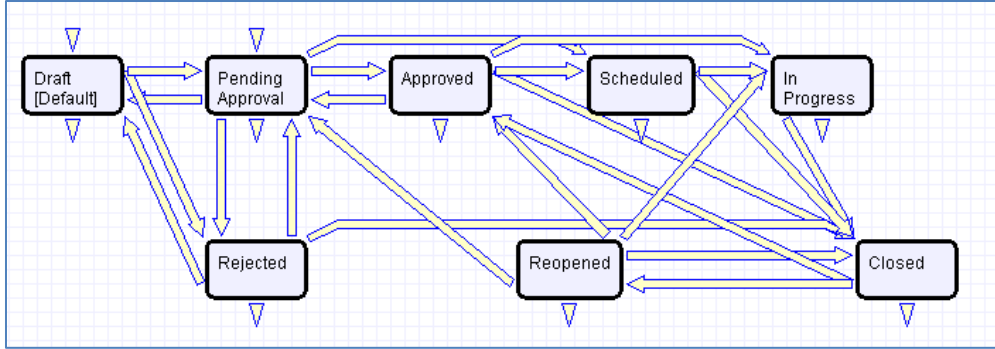
I: Validations

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

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

I: Staff edit actions no api

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



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	

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

Save
Cancel
Details Relationships Contracts Requests Emails History
<< >>

Asset Tag	<input type="text" value="1234567"/>	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" value=""/>
Model Name/Number	<input type="text" value="OptiPlex GX150 MT (P3 933MHZ, 256MB RAM, DVD-CD)"/>		
Model Description			
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" value=""/>	OS Version Detail/Service Pack	<input type="text" value=""/>

Purchase Details

Date Purchased	<input type="text" value="Dec 06 2011"/>	Purchase Cost	<input type="text" value="\$ 1052"/>
PO Number	<input type="text" value=""/>	Invoice Number	<input type="text" value=""/>
Date Installed	<input type="text" value=""/>	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" value=""/>
Working Notes				
<div style="border: 1px solid #ccc; width: 100%; height: 100%;"></div>				

Save
Cancel
<< >>

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.

Asset

Save Cancel Details Relationships Contracts Requests Emails History << >> [Icons]

Asset Tag: 1234567 Serial number: 12443634e634

Status: In Stock *Disposition: Shared Asset (radio) Assigned to User (radio)

Asset Name: Dell OptiPlex GX150 MT:12443634e634 ID: 28

Upstream and Downstream Assets

Upstream Assets
 Select assets by using the magnifying glass lookup to find them
 Status: No records.
 [New] [Magnifying Glass] [Unlink] [Print]

Downstream Assets
 Status: No records.
 [New] [Magnifying Glass] [Unlink] [Views] [Print]

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

Auto-Updating Asset Information

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

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

Record Creation

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

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

Processing of Records

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

Assets are created in the state of Installed/In Use by default (see Workflow diagram below). Assets that are requested but not immediately available might be created in a state of On Order, moved to In Stock

when the asset is received, Pending Install while Operations is tasked with installing the asset, and finally Installed. Installed assets can change to In Maintenance for repairs and Retired or Stolen when the asset is no longer in use.

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

OWNERSHIP

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

AUTOMATION

Edit: Actions triggered by web or API

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

Runs: When edited by web or email.

Search filter: None

Priority: 12

Actions:

I: edit actions by api or web

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

TB: Reminder of Next Scheduled Due Date

Purpose: This handles notifications for Assets with Service dates.

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

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

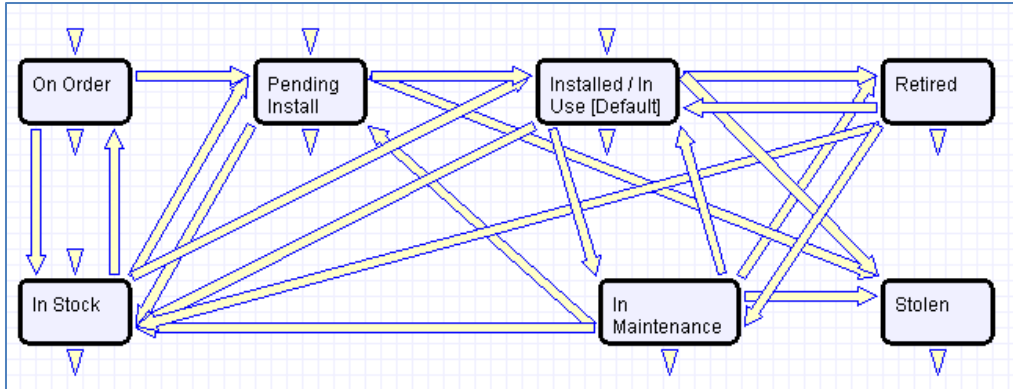
Priority: 2

Notes: This time-based rule is disabled

Actions:

E: Email Responsible Team of scheduled service

WORKFLOW



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

The screenshot shows a web-based form titled "Model". At the top, there are navigation tabs: "Details" (selected), "Assets", "Communications", and "History". Below the tabs, the form contains the following fields and controls:

- ID:** 148
- *Model Abbreviation:** 223-4494
- *Model Name/Number:** 223-4494 (Power Edge R200 Quad Core 2.1)
- Asset Type:** Data Center (dropdown)
- Asset Subtype:** Server (dropdown)
- Manufacturer:** Dell (dropdown)
- *Status:** Active (radio button selected), Inactive (radio button)
- 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 (dropdown)
- Responsible Team Leader:** (search icon)

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

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

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

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

End User Record Submission

End users do not have access to the Models table.

Technician Record Submission

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

OWNERSHIP

Records in this table are owned by the user that created them. More 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' form with the following fields and values:

- ID:** 9
- Status:** Active (radio button selected), Inactive (radio button unselected)
- *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:** (empty text area)
- Date of Initial Purchase:** (empty date field with calendar icon)
- Date of Latest Purchase:** (empty date field with calendar icon)
- Responsible Maintenance Team:** Support Team (dropdown menu)
- Responsible Team Leader:** (empty text field)
- Asset Polling name:** (empty text field)
- License Information:**
 - *Type of License:** CAL (Client Access License) (dropdown menu)
 - Total Number of Licenses:** 1
 - Number of Licenses Actively Used:** 1 (with a **Calculate** button)
 - Number of Licenses Available:** (empty text field)
 - Person Responsible for License Purchases:** (empty text field with a magnifying glass icon)

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

Requests Created Directly

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.

Repair Request

Save Cancel Details Working Related Records Time Emails History

RMA Number 21

Priority Medium

Status In Repair Assigned To Jane Repairgal

User Information

*Customer Name John Customer Customer Company EnterpriseWizard

Customer Phone 333-555-1212 Ext. 122 Cell Phone 333-124-4233

*Customer Email example@example.com

Repair Description

*Request Type Cross-Ship *Approved? Yes No Approved/Denied By EWSsystem

*Summary Printed pages have streaks

Product Description Lexmark a10 AIO

Steps to Reproduce Problem All printed pages have white streaks

Save Cancel

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 of Records

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

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

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

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

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

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

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

OWNERSHIP

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

AUTOMATION

Create: New Repair Request actions

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

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

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

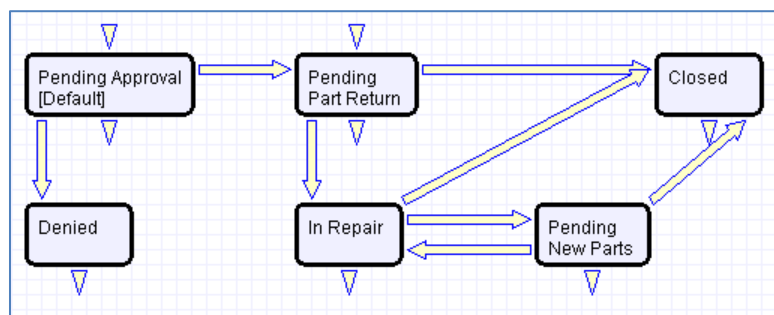
Priority: 1

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



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](#).

USE CASE

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 << >>

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 of 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 the someone other than, the new [Assigned To](#) or a member of the new [Assigned To](#) team, an email will be sent notifying them of the reassignment.

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 is required to 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!='$_1888_full_name' and Assigned To!='$supdater_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.

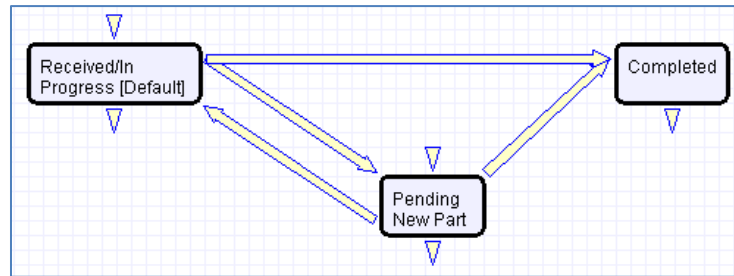
Search filter: R: Part Follow-Up Date <= Today

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.



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 tables with background tables such as Contract Types and Workflows playing 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

Contract Details
Attachments
Notes and Approvals
Related Contracts / Renewal
Assets
DocuSign
Emails
History

ID: 143

*Record Type:

Assigned Team:

Status:

Contract Party Type:

Workflow Title:

Parent Contract ID:

*Internal Contract Owner:

Renewal Type:

*Contract Type:

Approval Type: Parallel

Requester Information

Requester Name: Requester Phone: Ext.

Requester Email:

For Department: Department Head: Ralph Knowles

Contract Information

*Contract Title:

*Contract Description:

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

*Contract Start Date: *Contract End Date:

Contract Amount:

Contract Party Information

Company Name: Apple

Required fields, marked with a red asterisk, are: [Record Type](#), [Internal Contract Owner](#), [Contract Type](#), [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 Vendor details, approval information, attached contract 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:

- Clicking **New** in the Contract table action bar
- Using the **Create Related Contract** button on the **Related Contracts/Renewal** tab to create a renewal, subcontract, or amendment from the current contract. This button is available only if the contract is in a **Status** other than Draft, Pending Contract Manager, or Pending Approval.

Creating a new contract the second way will automatically link it to the current contract by populating the **Parent Contract ID** field. A more detailed explanation of creation by this method is handled in the [Handling Related Contracts/Renewals](#) section.

Contracts fall into one of four categories:

- Contracts
- Master Contracts
- Subcontracts
- Amendments

The category is indicated by the **Record Type** field in the contract common area. “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** should be filled in. Subcontracts and Amendments should also be linked to a parent contract.

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

ID	163	
*Record Type	Amendment	*Parent Contract ID 143
Assigned Team	Contract Manager Team	*Internal Contract Owner Jared Smith
Status	Draft	Renewal Type Notify staff to renew
Contract Party Type	Customer	*Contract Type Subscription Service
Workflow Title	Contract Mgr and Legal parallel approvals	Approval Type Parallel

Buttons: Submit for Approval, Cancel Contract

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

This screenshot is identical to the one above, but with a red circle highlighting the **Assigned Team** and ***Internal Contract Owner** fields.

Once the appropriate fields are filled in, the contract may be saved in a **Status** of Draft to await revision. If the creator knows which approval workflow applies to a particular contract, he or she may also click the **Submit for Approval** button directly to save the contract and move it into a **Status** of Pending Approval. For more information on the approval process, refer to [Handling Approvals](#) below.

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 and Contract Manager groups may 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.

The **Contract Signers** fields are used to populate the signature page of the contract print templates, and to add DocuSign tags to contracts using DocuSign.

Contract Signers			
Internal Signer	Martin Borman	Internal Signer Email	
Internal Signer Title		Internal Signer ID	415
1st Party Signer Name	Jack Becker	1st Party Signer Email	ewemtestuser2@gmail.com
1st Party Signer Title	Lead Repair Tech	1st Party Signer ID	409
2nd Party Signer Name	Robert Barash	2nd Party Signer Email	example33@example.com
2nd Party Signer Title	Contract Manager	2nd Party Signer ID	399

The **Attachments** tab shows all attached files related to the contract and provides the user with options to create and edit related attachments. The **Create and Attach** action button can be used to auto-generate a contract document from an MS Word print template specified in the **Print Template to Generate** field, which has a default value set based on the **Contract Type** chosen. Clicking the **Create and Attach** button generates the document and then creates an Attachment record to hold the attached file. It also increments the **Version Number** field.

Attachments can be automatically generated from inbound emails containing attached files. Files in inbound emails are mapped to the **Transitional Contract Files** field in the Contract, given a predetermined **Attachment Title** and **Attachment Type** value, and then converted into a new Attachment record with the file mapped to the **Attached File** field. If multiple files are attached, each one is converted into a separate Attachment record.

All Contract Attachments							
Print Template to Generate	Agiloft Hosted Service Level Agreement	Create and Attach					
Contract Attachments							
Status: 3 record(s) found, 1 pages. Click here to re-count records.							
New Select Files Mass Edit Unlink				Views Search			
Edit	ID ↓	Attachment Type	Title	Attached File	To Be Signed	Status	Date Created
	77	Insurance Certificate	Certificate of Liability	Attachment J-18 Cert of Insurance.docx		Active	Jun 05 2014 13:19
	75	Signed Agreement	Agiloft Service Level Agreement	Agiloft-SLA-224.docx		Active	Jun 05 2014 12:31
	4	Signed Agreement	Final Agreement	agmt1.docx		Superceded	May 09 2014 12:33

The [Contract Attachments](#) related table is also used to manually create and attach files to the contract, such as insurance certificates, performance bonds and signed agreements. Create attachments from within the contract record by clicking [New](#) on the related table menu.

The [Select Files > Add/Remove from DS Envelope](#) actions on the action bar can be used to add/remove selected attachments to and from the DocuSign envelope. When these actions are selected, the [To Be Signed](#) field is set to Yes or No, and the [DS Files to Sign](#) field under the [DocuSign](#) tab is updated with the attachments.

<input type="checkbox"/> Edit	Title	Attached File	To Be Signed	Status	Date Created
<input type="checkbox"/>	Certificate of Liability	Attachment J-18 Cert of Insurance.docx		Active	Jun 05 2014 13:19
<input checked="" type="checkbox"/>	75 Signed Agreement	Agiloft Service Level Agreement Agiloft-SLA-224.docx		Active	Jun 05 2014 12:31
<input type="checkbox"/>	4 Signed Agreement	Final Agreement agmt1.docx		Superseded	May 09 2014 12:33

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

Notes relevant to the contract process are entered into the three notes fields on the [Notes and Approvals](#) tab. [Notes To/From Party Contacts](#) is used for messages with the contract party. The [Send Notes to Outside Party](#) button sends the latest note contents to the contract party. The [Approval Notes](#) field is used for notes pertaining to the approval process. The [Ongoing Notes](#) field is used for any other notes that apply to the contract.

Information about the renewal process is stored on the [Related Contracts / Renewal](#) tab. Fields for capturing the [Renewal Notification Date](#), [Renewal Cost](#), [Renewal Status](#) and [Renewal Notes](#) are provided as a default. If relevant, linked parent and renewal information is automatically updated by the system. Users typically do not link contracts manually.

Assets can be linked to individual contracts from the [Assets](#) tab. Assets must be added separately to the [Assets](#) table before they will be available to attach to contracts.

Contract

Save Cancel Contract Details Attachments Notes and Approvals Related Contracts / Renewal **Assets** DocuSign Emails

ID 224

*Record Type Subcontract *Parent Contract ID 142

Assigned Team Contract Manager Team *Internal Contract Owner Agiloft Admin

Status Draft Renewal Type Notify staff to renew

Contract Party Type Vendor *Contract Type Subscription Service

Workflow Title Alternate One Step Legal Approval Approval Type Parallel

Submit for Approval

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

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 Choose one
For One or More Assets

Type of License For Software Application
No Assets

Date of Latest Purchase

Responsible Team Responsible Person

Software Manufacturer Microsoft

Number of Licenses 16

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.

If DocuSign integration has been deployed, a **DocuSign** tab will appear to the right of the **Assets** tab. This tab contains all fields related to DocuSign. The **DS Files to Sign** field holds attached files from the Attachments table that have a **To Be Signed** 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.

The **Create DocuSign Envelope** action button will create a DocuSign Envelope record, attaching the files in the **DS Files to Sign** field, and will also create a DocuSign Recipient record for each signer in the **Contract Signers** section of **Contract Details** tab. These records are then shown in the related tables for DocuSign Envelopes and DocuSign Recipients. Only admins and DocuSign Users can access the DocuSign tab. For more information on DocuSign, refer to the [DocuSign Tables](http://www.agiloft.com/documentation/docusign-users-manual.pdf) section and the detailed DocuSign User Manual at <http://www.agiloft.com/documentation/docusign-users-manual.pdf>.

DocuSign Files

DS Files to Sign Agiloft-SLA-224_1.docx, Agiloft-SLA-224-rev2.docx **Refresh Files**

DocuSign Envelopes

Create DocuSign Envelope

DocuSign Envelopes
Status: 2 record(s) found, 1 pages. [Click here](#) to re-count records.

<input type="checkbox"/>	Edit	ID ↓	Status	Sender	Attached Documents	Create & Preview	Send
<input type="checkbox"/>		18	Draft	System	Agiloft-SLA-224_1.docx; Agiloft-SLA-224-rev2.docx	Create & Preview	Send
<input type="checkbox"/>		17	Draft	System	Agiloft-SLA-224_1.docx; Agiloft-SLA-224-rev2.docx	Create & Preview	Send

DocuSign Recipients

DocuSign Recipients
Status: 2 record(s) found, 1 pages. [Click here](#) to re-count records.

<input type="checkbox"/>	Edit	ID	Send Order ↑2	Status	Full Name	Email	Title	Role Name
<input type="checkbox"/>		40	2	Draft	Jack Becker	ewemtestuser2@gmail.com	Lead Repair Tech	Customer1
<input type="checkbox"/>		41	3	Draft	Jane Simmons	ewemtestuser1@gmail.com	Asst Lead Repair Tech	Customer2

Handling Approvals

The order and nature of approvals are determined according to the **Workflow Title** selected. **Workflow Title** choices are determined from the combination of selections in the **Contract Party Type** and **Contract Type** fields. For information on setting up the individual Workflows, refer to the [Workflows Table](#) section.

Contract

Save **Cancel** **Contract Details** Attachments Notes and Approvals Related Contracts / Renewal Assets DocuSign Emails History

ID 163

*Record Type Amendment *Parent Contract ID 143

Assigned Team Contract Manager Team *Internal Contract Owner Jared Smith

Status Draft Renewal Type Notify staff to renew

Contract Party Type Customer *Contract Type Subscription Service

Workflow Title Contract Mgr and Legal parallel approvals Approval Type Parallel

Submit for Approval

The **Approval Type** is automatically set by the system. To submit a contract for approval, select the correct **Workflow Title** from the drop-down provided and click the **Submit for Approval** button. This updates the **Status** of the contract from Draft or Pending Contract Manager to Pending Approval and starts the approval process.

The screenshot shows a web interface for a 'Contract' record. At the top, there is a header with a 'Contract' icon and title. Below the header is a navigation bar with tabs: 'Contract Details' (active), 'Attachments', 'Notes and Approvals', 'Related Contracts / Renewal', 'Assets', 'DocuSign', 'Emails', and 'History'. The main form area contains several fields:

- ID: 163
- *Record Type: Amendment (dropdown)
- Assigned Team: Contract Manager Team (dropdown)
- Status: Draft (dropdown)
- Contract Party Type: Customer (dropdown)
- Workflow Title: Contract Mgr and Legal parallel approvals (dropdown, highlighted with an orange circle)
- *Parent Contract ID: 143 (with a red circle icon)
- *Internal Contract Owner: Jared Smith (dropdown)
- Renewal Type: Notify staff to renew (dropdown)
- *Contract Type: Subscription Service (dropdown)
- Approval Type: Parallel

At the bottom left of the form, there is a button labeled 'Submit for Approval' which is highlighted with an orange circle.

There are two possible **Approval Types**:

- Parallel
- Sequential

If an approval workflow has an **Approval Type** of Parallel, the system automatically generates the approvals required according to the information specified in the selected workflow. The approval records for each contract appear in the **Notes and Approvals** tab under the **Approvals Required** subsection.

Contract

Save Cancel Contract Details Attachments **Notes and Approvals** Related Contracts / Renewal Assets

ID 136

*Record Type Contract Parent Contract ID

Assigned Team Contract Manager Team *Internal Contract Owner Jared Smith

Status Active Renewal Type Notify staff to renew

Contract Party Type Customer *Contract Type Subscription Service

Workflow Title Contract Mgr and Legal parallel approvals Approval Type **Parallel**

Cancel Contract

Notes to/from Contract Party

Notes To/From Party Contacts

Send Notes to Outside Party Sent to Party By

Approval Notes

Approval Notes

Approvals Required

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

New Mass Edit Delete Unlink Actions Views Search

<input type="checkbox"/>	Edit	ID ↓	Approval Team	Approval Status	Approved/Rejected By	Date Approved/Rejected
<input type="checkbox"/>		185	Contract Manager Team	Pending Approval		
<input type="checkbox"/>		184	Legal Team	Pending Approval		

Number of Approvals Needed 2 Number of Approvals Received 0

Approval Team(s) are notified and must edit the pre-generated Approval records to either Accept or Reject the contract as is. Once all required approvals are received, the system automatically sets the contract **Status** to Approved.

If a workflow has an **Approval Type** of Sequential, the system automatically notifies the first approvers in the sequence of the pending approval. A progress bar also appears in the common area to provide a quick visual reference of the approval process.

To advance in the sequential workflow, an approver may select one of three actions in the **Approval Action** field:

- Approve and Route Forward to send the contract to the next approver in the sequence
- Reject and Route Back one step to send the contract to the previous approver for changes
- Reject and Route to Beginning if the contract requires significant changes

Once an **Approval Action** is selected, click the **Review Completed** button. The system automatically generates an audit trail of approval records under the **Approvals Received** subsection. The next approver in the approval sequence is notified that a contract is pending his or her approval.

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/Renewals

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

To create a related contract, select the [New Record Type](#) of the new contract. The choices in the drop down are filtered by the [Record Type](#) of the original contract. These fields are visible only when the contract is in a [Status](#) of Active, Cancelled, Expired, or Signed. Clicking the [Create Related Contract](#) button maps relevant information from the current contract into the new one. If the new contract is a renewal, use the [Create Renewal Contract](#) button instead. A new contract generated in this way may be edited before saving.

If applicable, the system automatically links renewal contracts to any preceding contracts, creating a chain for auditability. Assets linked to the preceding contracts will be linked to the renewal contracts as well. This information and related information on the contract process for renewals are stored in the bottom half of the [Related Records / Renewal](#) tab. Users typically do not enter information into the [Renewal Contract](#) and [Previous Contract Information](#) fields manually.

Contract Processing

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

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

Similarly, when the **Contract End Date** occurs, if the contract does not have an associated renewal contract, the system automatically sets the **Status** to Expired. If the contract does have a renewal, the system instead sets the **Status** to Renewed.

The contract may be cancelled by clicking the **Cancel Contract** button in the common area. Additionally, users of the Admin group can manually change the contract status to Cancelled.

The screenshot shows the 'Contract' management page for ID 170. The 'Status' is set to 'Pending Approval'. The 'Record Type' is 'Subcontract'. The 'Assigned Team' is 'Contract Manager Team'. The 'Contract Party Type' is 'Vendor'. The 'Workflow Title' is 'Contract Mgr and Legal parallel approvals'. The 'Approval Type' is 'Parallel'. The 'Internal Contract Owner' is 'Robert Barash'. The 'Contract Type' is 'Service Contract'. The 'Parent Contract ID' is 142. In the common area, the 'Cancel Contract' button is highlighted with an orange circle.

If the contract has a **Status** of Approved, two additional buttons are visible in the common area. The **Send Back for Reapproval** button emails the approving teams that reapprovals are necessary, updates the **Status** to Pending Approval, and restarts the workflow from the beginning. The **Mark as Signed** button updates the contract status to Signed.

The screenshot shows the 'Contract' management page for ID 141. The 'Status' is set to 'Approved'. The 'Record Type' is 'Contract'. The 'Assigned Team' is 'Contract Manager Team'. The 'Contract Party Type' is 'Customer'. The 'Workflow Title' is 'Customer or Partner 3 approval steps'. The 'Approval Type' is 'Sequential'. The 'Internal Contract Owner' is 'Jared Smith'. The 'Contract Type' is 'Product Support and Upgrades'. The 'Parent Contract ID' is empty. In the common area, the 'Send Back for Reapproval' and 'Mark as Signed' buttons are highlighted with orange circles.

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:

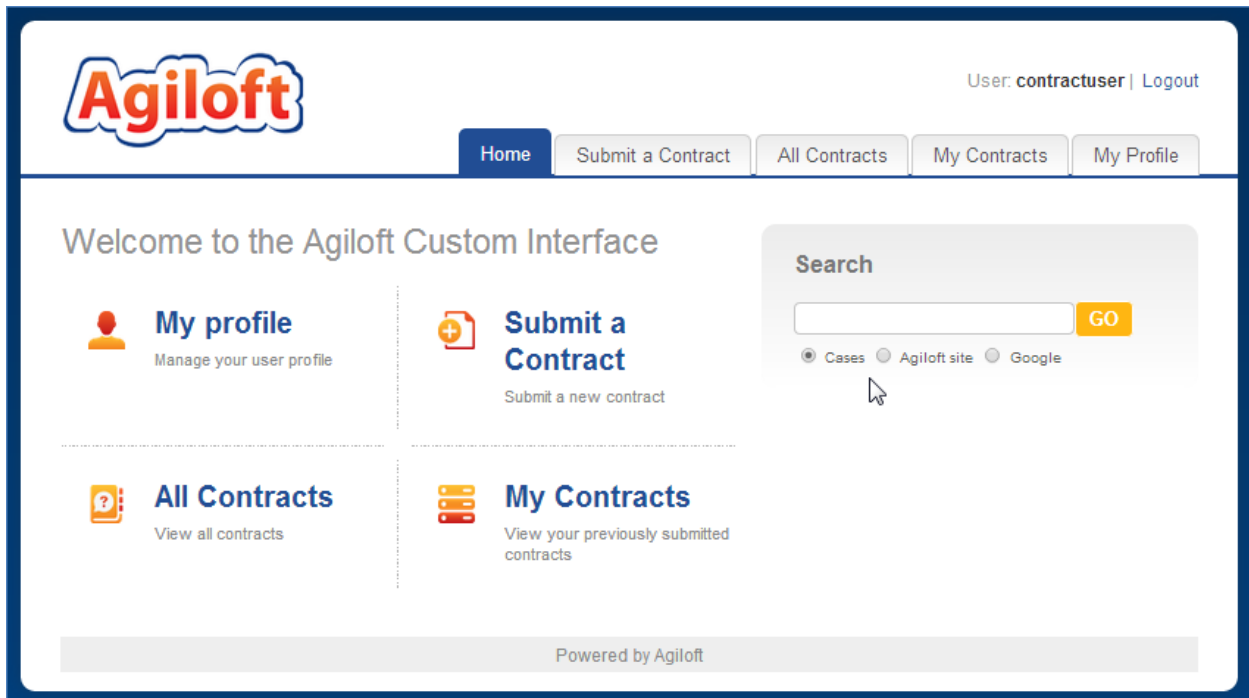
1. Change permissions to allow the Contract Manager Group to change the **Contract Status** field.
2. Remove status-changing buttons from the layout: **Submit for Approval**, **Send Back for Reapproval**, **Mark as Signed**.
3. Remove the **Approval** tab and related fields from the layout.

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. Below is a representative home page for an end user in the Contract Creator group.



Contract Creation

Users in the Contract Creator group may create contracts by clicking the **Submit a Contract** link 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.

Contract

Save
Cancel
Contract Details
Attachments
Notes & Renewals
Assets
<< >>

ID: 248

*Record Type: Parent Contract ID:

Contract Party Type:

Submit for Review

Requester Information

For Department: Department Head: [Paula Ling](#)

Contract Information

*Contract Title:

*Contract Type:

*Contract Description:

*Contract Start Date: *Contract End Date:

Contract Amount: \$

Contract Party Information

Company Name:

Location Name: Primary Location ID:

Street Address:

City: State / Province:

Country:

Zip or Postal Code:

Party Main Contact: Party Main Contact Email:

Locations covered by this contract

[Click the magnifying glass to select Locations.](#)

Covered Locations:

Save
Cancel
<< >>

Once the required information is filled in, the contract may be saved for further revisions. The contract requester may also choose to press the **Submit for Review** button to request approval from a Contract Manager for the request. The contract requester may be contacted to update the submitted contract, but he or she is no longer involved in the approval process from this point forward.

Once the contract requester submits the contract for review, a contract manager decides whether to move the contract along the approval process or reject the request.

Working with Contracts

At any time, the contract requester may view his submitted contracts by clicking the **My Contracts** tab. A contract requester may edit select fields in contracts he owns. 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 contracts or contracts in process.

The contract requester may also view all contracts he has 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 "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

```
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
}
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
}
if (Status='Signed' and Contract End Date>1 day in the future and Contract Start Date>1 minute old) {
    Set Status to Active
}
if (Renewal Contract='No') {
    Blank out Previous Contract ID
}
if (Renewal Contract='Yes' and Previous Parent Contract ID=NULL) {
    Blank out Parent Contract ID
}
if (Renewal Contract='Yes' and Previous Parent Contract ID!=NULL) {
    Copy Previous Parent Contract ID to Parent Contract ID
}
```

U: Update Renewal Notification Date

Updated Field: [Renewal Notification Date](#)

Updated Value: \$contract_end_date – (\$days_in_advance_to_notify_for_renewal) DAYS

Edit: Updates by Party

Purpose: This rule handles notifications for Contracts that are updated by an outside party that does not have 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 Sender of Outside Party Update

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

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

I: Handle Inbound Files

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

Edit: All 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 (Approval Type='Parallel' and Number of Approvals Needed='$number_of_approvals_received' and Number of Approvals Needed>=1 and
Status='Pending Approval') {
    Set status to Approved
    Email Contract Owner of approved contract
}
if (Status changed from: any value to: 'Pending Approval' during record's last modification and Approval Type='Sequential' and Show Approval
Steps='No') {
    Set Show Approval Fields to Yes
} else if
(Status changed from: 'Pending Approval' to: any value during record's last modification and Show Approval Steps='Yes')
{
    Set Show Approval Steps to No
}
if (Times Sent for Approval>=1 and Workflow Title changed from: any value to: any value last user's modification) {
    Not Allowed to Change Workflows
}
if (Contract End Date changed from: any value to: any value last user's modification or Days in advance to notify for renewal changed last
user's modification) {
    Update Renewal Notification Date
}
if (Status changed from: any value to: 'Signed' last user's modification and Contract Start Date>=1 minute old and Contract End Date>1 day
in the future) {
    Set Status to Active
}
if (Status changed from: 'Cancelled' to: 'Pending Contract Manager' last user's modification) {
    Set Status of existing approvals to Requires Reapproval
    Clear Approval Action
    if (Current Step ID!='$starting_step_id0') {
        Set Current Step ID to Starting Step ID
    }
}
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','Cancelled' last user's modification) {
    Set Linked Attachments' Status to Contract Inactive
}
}

```

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

Purpose: This rule handles notifications for Contracts that are updated by an outside party that does not have direct access to the system, as well as the [Attachment Type](#) and [Attachment Title](#) for inbound files

Runs: When edited by email, web or API.

Search Filter: R: Transitional Contract Files field changed

Priority: 15

Actions:

C: Convert to Attachment

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

I: Blank out Transitional Contract Files field

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

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

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

Runs: At selected time intervals; monthly, on the first of each month at 6 AM

Search Filter: Demo Records

Priority: 1

Action:

U: Update Demo Dates

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

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

TB: Notify of upcoming expirations (disabled)

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

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

Search Filter: R: Renewal date is tomorrow

Priority: 3

Action:

E: Email Contract Owner About Renewal Date

Sent To: User in the Contract Manager field

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

TB: Daily Check for Start Date (disabled)

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

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

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

Priority: 4

I: Actions When Start Date Arrives

```

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

```

TB: Daily Check for Expiration Date (disabled)

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

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

Search Filter: R: Active, End date passed

Priority: 5

I: Set to Expired or Renewed

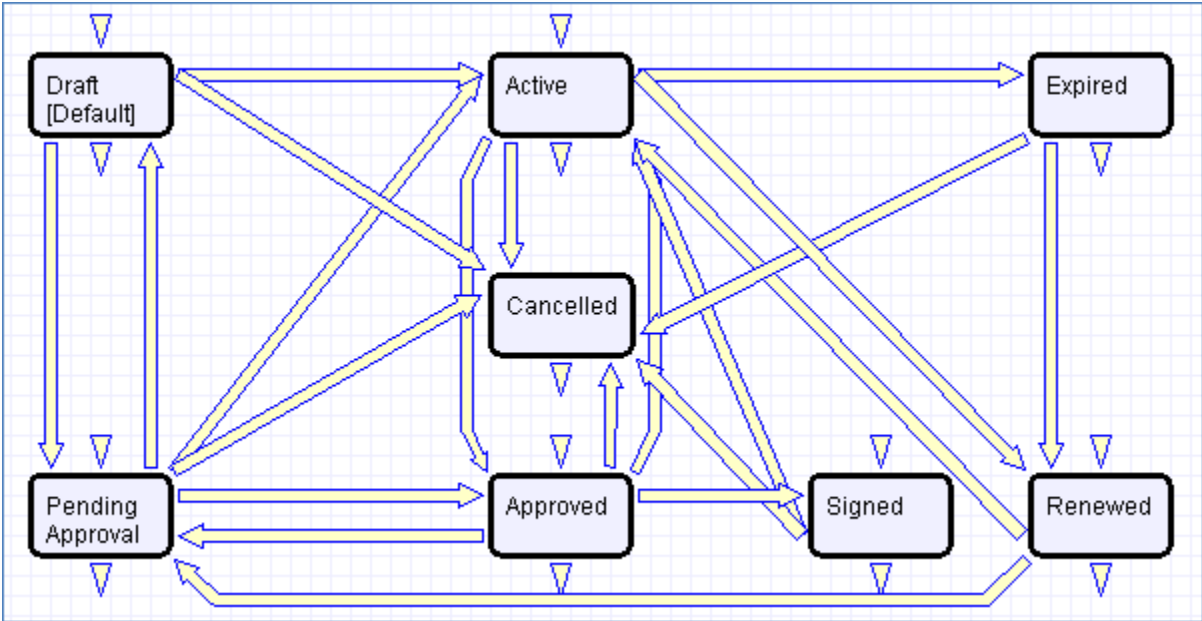
```

if (Renewal Contract ID!=NULL) {
    Set Status to Renewed
} else {
    Set Status to Expired
}

```

WORKFLOW

The Contracts table has the following workflow:



REPORTS

The Contracts 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
<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"/>		Value of Contract Renewals in Next Year by Month	Active Contract expiring within next 12 months (C)	No
<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 that holds a record for each value to be displayed as a choice in the [Contract Type](#) field of a Contract record. It also determines the default approval Workflow for the contract, as well as the default print template for auto-generation of draft contract documents.

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 another table.

If the [Has Print Template\(s\)](#) field value is Yes, then the 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 set that pulls in the [Workflow Title](#) and [Approval Type](#) fields from the Workflow table.

Selecting a [Default Workflow Title](#) in the Contract Type record creates a link to the workflow and updates [All Contracts](#) using this [Workflow](#) field on the [Related Records](#) tab of the Workflow record.

You can view all available 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.

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

AUTOMATION

The Contract Types table has the following rules set up.

Create: All Create Actions

Purpose: This rule handles all create actions. 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 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.

USE CASE

Attachments can be created directly from a particular contract, from the Attachments table itself, via an action button in the Contract ([Create and Attach Contract](#)), or via an action that runs on files attached to inbound emails. DocuSign users can also create attachments via a conversion action that appends a signature page containing DocuSign tags to the end of an existing attachment. Attachments may have a [Status](#) of Active, Expired, Contract Inactive, or Superseded.

Attachment

Save
Cancel
Attachment
Contract Info
Emails
History
« »

ID
3

Attachment Type	Generated Agreement from Template	*Status	Active
*Title	Generated Draft Contract		
Attached File	Attach/Manage <input type="text" value="1. Agiloft-SLA-224_1.docx"/>	Merged File	Attach/Manage Merge Signature Block
Publication Level	All Internal	Supercede Old Versions	No
Expiration Date	<input type="text"/>		
Include in Approval Packet	No	To Be Signed	No

Each attachment also contains information about the parent contract for reference.

DocuSign users can 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. 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.

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 Signed field for DocuSign files, updating the linked Contract's DS Files 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 Signed='Yes') {
    Set Contract Update DS Files Flag to Yes
}

```

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 Signed](#) fields.

Runs: When edited by 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 signed to no](#)

Updated Field: [Merged File](#)

Updated Value: Delete

Updated Field: [To Be Signed](#)

Updated Value: No

Edit: When To Be Signed changes

Purpose: This rule checks to see if the To Be Signed field gets changed, and updates the DS Files to Sign field in the linked contract.

Runs: When edited by web or API.

Search Filter: None.

Priority: 2

Action:

I: [Edit actions for To Be Signed](#)

```

if (To Be Signed changed from: any value to: any value during record's last modification) {
    Set Contract Update DS Files Flag to Yes
}

```

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

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  
}
```

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 Attachments 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 Types field within Attachment records.

Attachment Types

Status: 6 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"/>		6	Performance Bond	Expiration Date, Performance Bond Fields	
<input type="checkbox"/>		5	Insurance Certificate	Expiration Date, Insurance Cert Fields	
<input type="checkbox"/>		4	Document Provided by Approver	Expiration Date	
<input type="checkbox"/>		3	Document Provided by Outside Party	Expiration Date	
<input type="checkbox"/>		2	Signed Agreement	Expiration Date	
<input type="checkbox"/>		1	Generated Agreement from Template	Expiration Date	

OWNERSHIP

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

PRINT TEMPLATES TABLE

The Print Templates table is a background table that holds a record for each print template used by the Contracts table or other system tables. It also keeps track of the [Version Number](#) of the attached print template document, and defines which Contract Types the print template is available for using 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.

Print Templates					
Status: 2 record(s) found, 1 pages. Click here to re-count records.					
New		Mass Edit	Delete	Actions	
Views		Search			
<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	

OWNERSHIP

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

AUTOMATION

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

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

Runs: Upon edit by Web or API

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

Priority: 10

Action:

U: [Append Contract Type to Available Contract Types](#)

APPROVALS TABLE AND APPROVAL TEMPLATES SUBTABLE

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

The Approval Templates table is used in the generation of required approval records for Parallel workflows. For more information on Workflows, see the [Workflows Table](#) section.

USE CASE

All Approval records are created by the system as a result of actions in the associated Contract record. Approvals whose source is a parallel workflow are generated from an Approval Template record, detailed later in this section. Approvals whose source is a sequential workflow are generated by record conversion from within the Contract record. For more information on Workflows, see the [Workflows Table](#) 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.

Approval

Save Cancel Details Emails History << >>

Approval Details

ID	186	Contract ID	28
Contract Title	Mobile devices warranty support		
Approval Status	Approved		
Approval Team	Contract Manager Team	Approver	EW Admin
Date Approved/Rejected	Jun 20 2013 11:45	Approved/Rejected By	EW Admin

Approval Notes

Approval Running Notes

Contract Details

Contract Company Name	AT&T	Contract Manager	EW Admin
Contract Description	Warranty on mobile devices owned by our company		
Contract Requester Name	Contract Requester Email		
Contract Start Date	Dec 05 2012	Contract Amount	\$500
Contract Files	No Files Attached		

Save Cancel << >>

Notes regarding the approval or rejection are entered into the [Approval Notes](#) field and are displayed under the [Approval Running Notes](#) section after being saved.

For information on how approval records are generation, refer to the Contracts Table: [Staff Use Case](#) section above.

Approval Template Records

Approval Templates may be created by users in the Admin and Contract Manager groups. Templates are used exclusively for parallel workflows.

The screenshot shows the 'Approval Template' form for ID 154. The form has tabs for 'Details', 'Workflows', and 'History'. The 'Details' tab is active. The form contains the following fields:

- ID: 154
- Approval Status: Pending Approval (dropdown)
- *Related To: Contracts (dropdown)
- Approval Team: Risk Team (dropdown)
- Approver: Agiloft System (dropdown)

Buttons for 'Save' and 'Cancel' are present at the top and bottom of the form.

Each Approval Template contains information about which table the template is **Related To** as well as the **Approval Team**. The **Approval Status** field is manually set by the approver in parallel workflows; it is automatically updated through an action button in sequential workflows. The **Approver** field is used by the system in the triggered conversion.

Each Approval Template may be used in multiple parallel workflows within a table. The **Workflows** tab displays all the workflows which use the current approval template.

The screenshot shows the 'Approval Template' form for ID 151, with the 'Workflows' tab active. The form displays a table of workflows used by the template. The table has the following columns: Edit, ID, Used in, Workflow Title, Contract Party Types, Contract Types, Workflow Type, and Number of Steps.

<input type="checkbox"/>	Edit	ID ↓	Used in	Workflow Title	Contract Party Types	Contract Types	Workflow Type	Number of Steps
<input type="checkbox"/>		8	Contracts	Contract Mgr and Legal parallel approvals	Vendor, Customer, Partner, Other, Employee	Product Support and Upgrades, Software License, Subscription Service, Non-Disclosure Agreement, Partner Agreement, Other, Parts only Contract, Service Contract, Goods and Services	Parallel	0
<input type="checkbox"/>		1	Contracts	All parties 4 parallel w/risk and compliance	Vendor, Customer, Partner, Other, Employee	Product Support and Upgrades, Software License, Other, Service Contract, Goods and Services	Parallel	0

Buttons for 'Save' and 'Cancel' are present at the bottom of the form.

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: Contract Approval Creation actions for both workflow types

Purpose: This rule handles actions resulting from the creation of an Approval Record generated from a sequential workflow or from a parallel workflow (i.e. approval template). It does not control the creation of any records itself.

Runs: When created by web or API.

Search Filter: R: Related to Contracts or Documents

Priority: 1

Actions:

I: All Create Actions

```
if (Source='Sequential Workflow') {  
    if (Contract Approval Action='Approved - Route Forward') {  
        Set Status to Approved and people fields  
    } else {  
        Set Approval Status to Rejected and people  
    }  
} else if (Source='Approval Template') {  
    Email Approval Team of Pending Approval  
} else if (Source='Document Management') {  
    Set Approval Team to Doc Reviewers  
    Email Reviewer of Pending Approval  
}
```

Edit: All Edit Validations

Purpose: This rule handles validations for approval records associated to parallel workflows.

Runs: When edited by web only.

Search Filter: None.

Priority: 1

Actions:

I: All Edit Validations

```
if (Approval Status changed from: 'Pending Approval' to: any of 'Rejected','Approved' last user's modification and Approval Team!<<$GLOBAL.my_teams' and (Source for Template Conversion='Approval Template' or Source='Document Management')) {  
    you are not on approval team  
} else if (Approval Status changed from: any value to: 'Rejected' last user's modification and Approval Notes not changed last user's modification) {  
    need to add notes when rejecting  
}
```

Edit: All Edit Action for updates by Web and API

Purpose: This rule handles all updates to an approval record and notifications resulting from changes in the parent contract record.

Runs: When edited by web or API.

Search Filter: None

Priority: 2

Actions:

I: All Edit Actions

```
// All updates to approvals for contracts
if (Related To='Contracts') {
  if (Source='Approval Template') {
    // Approvals for parallel workflow contracts
    if (Approval Notes changed from: any value to: any value during record's last modification) {
      Copy approval notes to contract
      Copy approval notes to running notes
      Blank approval notes
    }
    if (Approval Status changed from: any of 'Pending Approval','Approved','Requires Reapproval' to: 'Rejected' during record's last modification) {
      Set Contract Status to Draft
      Set other Approvals to Requires Reapproval
      Email Contract Manager of rejection
    }
    if (Approval Status changed from: any of 'Rejected','Approved','Requires Reapproval' to: 'Pending Approval' during record's last modification) {
      Email Approval Team of Pending Approval
    }
  }
}
if (Related To='Documents') {
  if (Source='Document Management') {
    if (Approval Notes changed from: any value to: any value during record's last modification) {
      Copy approval notes to Document
      Copy approval notes to running notes
      Blank approval notes
    }
    if (Document Rejected, Requires Update changed from: 'No' to: 'Yes' during record's last modification) {
      if (Approval Status='Rejected') {
        Set Document Rejected to No
      } else {
        Set Approval Status to Requires Reapproval
        Set Document Rejected to No
      }
    } else if (Approval Status changed from: any of 'Rejected','Requires Reapproval' to: 'Pending Approval' during record's last modification) {
      Email Approver Requires Reapproval
      Blank approval notes
    }
  }
}
}
```

AUTOMATION FOR APPROVAL TEMPLATES

The Approval Templates subtable has the following rules set up.

Edit: Approval Record Creation

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

Runs: When edited by web or API.

Search Filter: LF: Last Contract ID just changed

Priority: 1

Actions:

C: Create Approval Record

Conversion: Approval Table

Options: Silently with no confirmation; Do not report errors in GUI

WORKFLOW

The Approvals table and Approval Templates subtable have minimal workflow associated, and state changes are handled through rules automation rather than the graphical Workflow interface.

WORKFLOWS TABLE

Purpose: The Workflows table holds pre-defined workflows for the contract approval process.

USE CASE

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

Workflow

Save Cancel Workflow Related Records History << >>

ID 8 *Status Available

*Used in Contracts Workflow Type Parallel

*Workflow Title Change Requests parallel approvals

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

Approvals Needed

Select the Approvals needed for this Workflow by clicking the lookup icon

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

New Mass Edit Delete Unlink Actions Views Search

Edit	ID ↓	Type	Related To	Approval Team	Approver	Approval Status
	153	Approval Template	Contracts	Legal Team		Pending Approval
	151	Approval Template	Contracts	Contract Manager Team		Pending Approval

Save Cancel << >>

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 business processes can be used by the workflow.

Each workflow may have a [Workflow Type](#) of Parallel or Sequential.

If a workflow is Parallel, the required Approvals must be specified under the [Approvals Needed](#) heading. When the workflow is selected for use in an approval process, the system automatically generates required Approval forms using the approval templates specified. New required approval templates are created directly from within the related table by clicking the [New](#) button.

Workflow

Save Cancel Workflow Related Records History << >>

ID: 8 *Status: Available

*Used in: Contracts Workflow Type: Parallel

*Workflow Title: Contract Mgr and Legal parallel approvals

*Contract Party Types: Vendor, Customer, Partner, Employee, Other *Contract Types: Product Support and Upgrades, Software License, Subscription Service, Parts only Contract, Service Contract, Goods and Services, Non-Disclosure Agreement, Partner Agreement, Other

Select the Approvals needed for this Workflow by clicking the lookup icon
 Status: 2 record(s) found, 1 pages. Click [here](#) to re-count records.

New Mass Edit Delete Unlink Actions Views Search

Edit	ID ↓	Type	Related To	Approval Team	Approver	Approval Status
	153	Approval Template	Contracts	Legal Team		Pending Approval
	151	Approval Template	Contracts	Contract Manager Team		Pending Approval

If a workflow is Sequential, the **Workflow Steps** must be specified. Unlike parallel workflows, the system does not generate the entire set of required approval records at once. Instead, the system generates an Approval record after a decision is made in each step of the sequential process.

Workflow

Save Cancel Workflow Related Records History << >>

ID: 3 *Status: Available

*Used in: Contracts Workflow Type: Sequential

*Workflow Title: Customer or Partner 3 approval steps

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

Workflow Steps

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

New Mass Edit Delete Unlink Actions Views Search

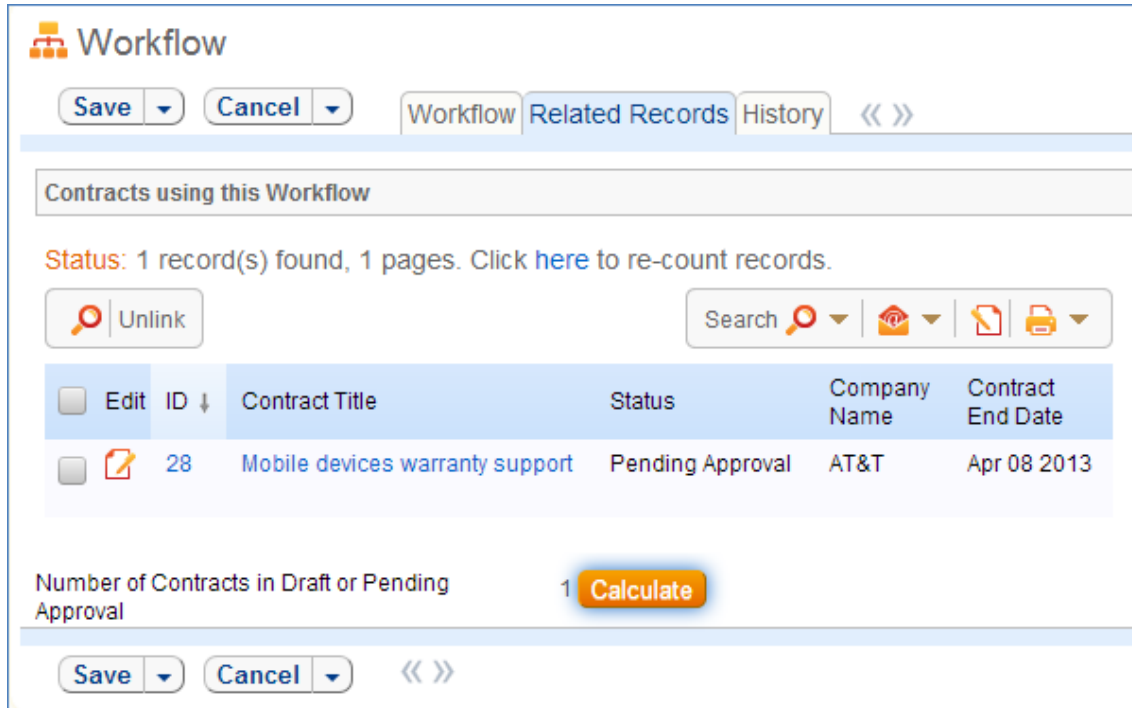
Edit	Step Number ↑	Step Title	Assigned Team	Workflow Title	Previous Step Number	Next Step Number	Total Steps in Workflow
	1	Contract Manager Team Review	Contract Manager Team	Customer or Partner 3 approval steps		2	3
	2	Finance Team Approval	Finance Team	Customer or Partner 3 approval steps	1	3	3
	3	Legal Review	Legal Team	Customer or Partner 3 approval steps	2		3

Number of Steps: 3 Refresh Totals and Images

Save Cancel << >>

New Steps can be created directly from within the related table by clicking **New**. For more information on Steps, see the [Steps Table](#) section.

The records currently using an approval workflow are displayed as a related table on the **Related Records** tab.



The screenshot shows the 'Workflow' interface with the 'Related Records' tab selected. The title is 'Contracts using this Workflow'. Below the title, it states 'Status: 1 record(s) found, 1 pages. Click [here](#) to re-count records.' There is an 'Unlink' button and a search bar with icons for search, email, print, and refresh. A table lists the contract details:

<input type="checkbox"/>	Edit	ID ↓	Contract Title	Status	Company Name	Contract End Date
<input type="checkbox"/>		28	Mobile devices warranty support	Pending Approval	AT&T	Apr 08 2013

At the bottom, there is a summary: 'Number of Contracts in Draft or Pending Approval' with a value of '1' and a 'Calculate' button. Navigation buttons 'Save', 'Cancel', and '<< >>' are also present.

Workflow Statuses

Each workflow may have one of three Statuses:

- Available
- In Use
- Inactive

Available indicates a workflow that is not currently in use by any approval process. When in this state, the workflow appears in the drop-down menu for selection. The Administrator may manually change the status to **Inactive** if needed.

In Use indicates a workflow that is being used by at least one approval process. The system automatically moves a Workflow to a status of **In Use** if it is being used. This is done by counting the number of records shown in the **Related Records** tab. If the number of related records is greater than 0, the workflow's **Status** is set to **In Use**. If the number of related records is equal to 0, the workflow **Status** is set to **Available**. For more information on Steps, see the [Steps Table](#) section below.

A **Status** of **Inactive** indicates a workflow that is no longer available for use in the approval process. An inactive workflow does not appear in the drop-down menu as a possible approval process selection. The Administrator may change a workflow from **Available** 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

Edit: by web or API - when number of contracts changes

Purpose: This rule handles all Status updates for Workflows when the number of contracts using a particular workflow changes.

Runs: When edited by web only.

Search Filter: R: Sequential and Number of pending Contracts just changed

Priority: 1

Actions:

I: Status Updates

```
if (Number of Contracts in Draft or Pending Approval>=1 and Status!='In Use') {  
  Set Status to In Use  
  if (Workflow Type='Sequential') {  
    Set Linked Steps to UnDeleteable  
  }  
} else if ((Number of Contracts in Draft or Pending Approval=0 or Number of Contracts in Draft or Pending Approval=NULL) and Status='In Use') {  
  Set Status to Available  
  if (Workflow Type='Sequential') {  
    Set Linked Steps to Deleteable  
  }  
}
```

Edit: Validations - sequential workflow: prevent status change

Purpose: This rule prevents workflow Status changes when a workflow is in use.

Runs: When edited by web only.

Search Filter: r: Workflow type is sequential

Priority: 2

Actions:

I: Edit validations

```
if (Status changed from: 'In Use' to: 'Available' last user's modification and Number of Contracts in Draft or Pending Approval>=1) {  
  cannot change from in use if used  
}
```

Edit: API Changes –cause refresh of steps (Disabled)

Purpose: This rule can be used to refresh the Steps used in a workflow. It is disabled by default.

Runs: When edited by web or API.

Search Filter: R: Refresh times just changed

Priority: 10

Actions:

U: Updated related steps with new total

Updated Fields: All Steps in This Workflow, Total Steps in Workflow(recalculate)

Updated Values: Use the **MT: Current record workflow = other step workflow and not deleted** search to find records and populate fields.

U: Refresh Image ID

Updated Fields: Image ID

Updated Values: \$step_number + ":" + format("steps.total_steps_in_workflow", \$total_steps_in_workflow)

STEPS TABLE

The Steps table holds the individual steps associated to a particular workflow in the Workflow table. Steps are created only for approval workflows with a **Workflow Type** of Sequential. For more information on Workflows, see the [Workflows Table](#) section.

USE CASE

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

Steps may be created directly from the Steps table; however, it is strongly recommended that steps be created from within a particular Workflow record via the related table.

Each step must be associated to a particular sequential workflow in the Workflow table. The workflow must exist prior to creating the Step record. Selecting a **Workflow Title** from the dropdown automatically links the step to the correct table (Contracts, Document, or Change Requests) and populates the **Workflow Usage** and **Used In** fields.

To create the step, the user selects the **Previous Step Number** from the drop-down and enters the current **Step Number** for the record. The user must also provide a **Step Title** and an **Assigned Team**. If applicable, the **Next Step Information** fields are populated automatically by the system.

Step

Save Cancel Details All Steps History << >>

Workflow Information

*Workflow Title: Customer or Partner 3 approval steps ID: 61

*Workflow Usage: Available *Used in: Contracts

Previous Step Information

Previous Step Number: 1 Previous Assigned Team: Contract Manager Team

Previous Step Title: Contract Manager Team Review

Current Step Information

*Step Number: 2 Assigned Team: Finance Team

*Step Title: Finance Team Approval

Next Step Information

The next step will be populated automatically once you create the next step.

Next Step Number: 3 Next Assigned Team: Legal Team

Next Step: Legal Review

Save Cancel << >>

The **All Steps** tab displays all current steps in the workflow as well as the associated progress bar graphic for the individual step. The progress bar is populated automatically by the system.

Step

Save Cancel Details All Steps History << >>

All Steps in the Workflow

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

Unlink Search

<input type="checkbox"/>	Edit	ID	Step Title	Step Number ↑	Assigned Team	Assigned Person
<input type="checkbox"/>		19	Contract Manager Team Review	1	Contract Manager Team	
<input type="checkbox"/>		61	Finance Team Approval	2	Finance Team	
<input type="checkbox"/>		21	Legal Review	3	Legal Team	

Total Steps in Workflow: 3

Save Cancel << >>

To minimize error, it is strongly recommended to create Steps in order. In addition, steps should always be created through the associated Steps table from within a particular Workflow record if possible.

A Step record may have a **Status** of either:

- Deletable
- Non-deletable

A status of **Deletable** indicates a step in an approval workflow that is not in current use. Specifically, a step may be deleted if it is part of a Workflow marked as **Available** or **Inactive**.

A status of **Non-deletable** indicates a step in an approval workflow that is currently **In Use**. An attempt to delete a non-deletable step is prevented by the system and results in a pop-up error message.

OWNERSHIP

Steps 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 Steps table has the following rules set up.

Create/Edit: All Validation Actions by Web

Purpose: This rule prevents editing a Step record while its associated workflow is In Use.

Runs: When created or edited by web only.

Search Filter: None.

Priority: 0

Actions:

I: All Validation Actions by Web

```
if (Workflow Usage='In Use') {  
    Not Allowed to Create or Modify Step  
}
```

Create: All create actions - set as next step in previous step, validate number

Purpose: This rule handles all creation actions, including updates to related Workflow and Step records.

Runs: When created by web only.

Search Filter: None.

Priority: 1

Actions:

U: Update All Steps Table

Updated Field: All Steps in This Workflow;

Updated Value: Uses the [MT: Current record workflow = other step workflow and not deleted](#) search to define the records and populate the field.

U: Update all steps through the workflow

Updated Field: All Steps in This Workflow

Updated Value: Uses the [MT: Current record workflow = other step workflow and not deleted](#) search to define the records and populate the field.

Updated Field: Total Steps in Workflow (recalculate)

Notes: This action goes up to Workflow and back down to all Steps to update the total workflow steps.

U: Update image id in all related steps

Updated Field: Image ID

Updated Value: \$step_number + ":" + format("steps.total_steps_in_workflow", \$total_steps_in_workflow)

I: All create actions

```
if (Previous Step ID!=NULL) {  
    Set Next Step ID for previous step record  
}
```

Edit: All edit by web

Purpose: This rule updates the number of Steps in the Workflow when edited by web.

Runs: When edited by web only.

Search Filter: None.

Priority: 11

Actions:

U: Update All Steps Table

Updated Field: All Steps in This Workflow

Updated Value: Uses the [MT: Current record workflow = other step workflow and not deleted](#) search to define the records and populate the field.

Delete: Update number of steps and image id when a step is deleted (Disabled)

Purpose: This rule updates the number of Steps in a workflow when a Step is deleted.

Runs: Never (disabled).

Search Filter: None.

Priority: 1

Actions:

U: Update all steps through the workflow

Updated Field: All Steps in This Workflow

Updated Value: Uses the **MT: Current record workflow = other step workflow and not deleted** search to define the records and populate the field.

Updated Field: Total Steps in Workflow (recalculate)

U: Update image id in all related steps

Updated Field: Image ID

Updated Value: \$step_number + ":" + format("steps.total_steps_in_workflow", \$total_steps_in_workflow)

```
if (Previous Step ID!=NULL) {  
    Set Next Step ID for previous step record  
}
```

WORKFLOW

The Steps table contains mostly static data, and is therefore not associated with any workflow or actions.

PROJECT MANAGEMENT TABLES

PROJECT TABLE

Purpose: This 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 in the states Work in Progress, Awaiting Customer Feedback, and Pending (**Status** field).

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 << >>

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 designated as the **Project Manager**.

AUTOMATION

Create: All Project creation actions

Purpose: This handles notifications for new project assignments.

Runs: When created by web, email or API

Search filter: None

Priority: 1

Actions:

I: All create actions

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

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

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

Runs: Edit by Web or API

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

Priority: 1

Actions:

I: Handle completing or adding tasks


```

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

```

Edit by Web: All edit actions

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

Runs: Edit by Web

Search Filter: None

Priority: 2

Actions:

I: All edit validation actions

```

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

```

I: All edit actions by web

```

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

```

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

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

Runs: Monthly

Search Filter: Demo Records

Priority: 1

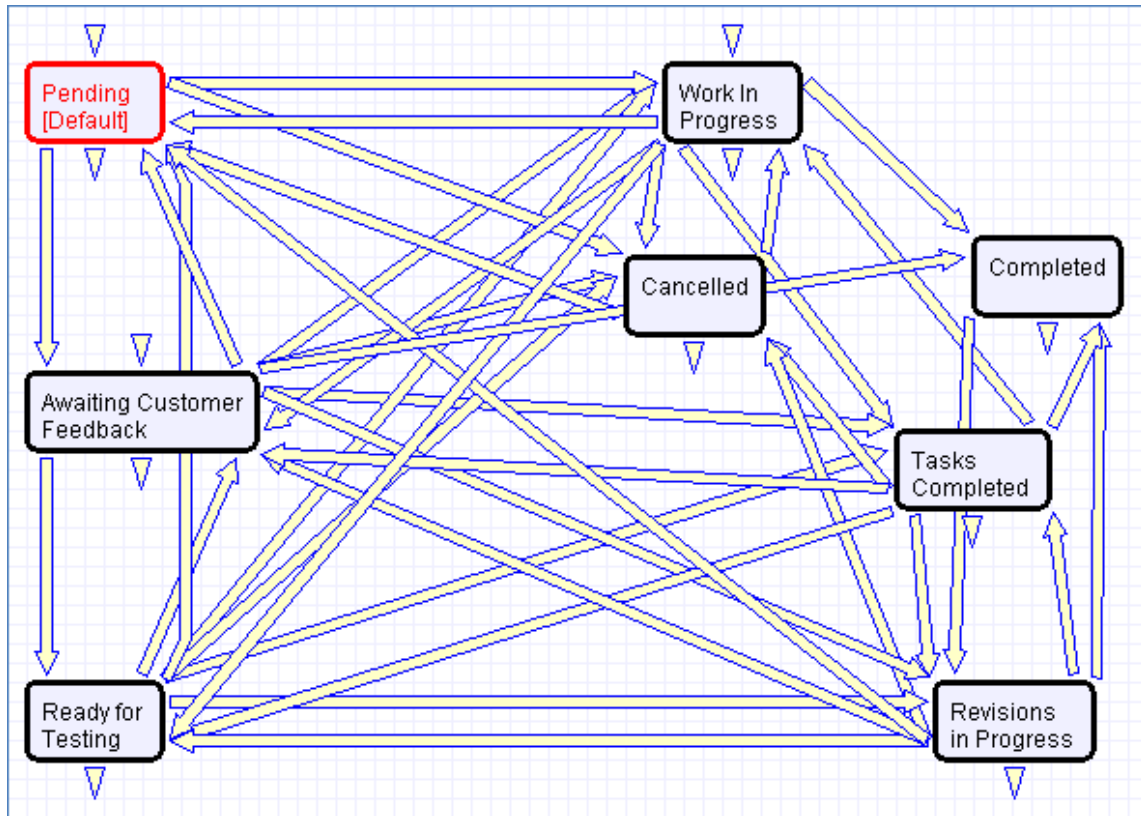
Actions:

U: Update Demo Dates

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

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

WORKFLOW



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

Purpose: This 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 <input type="button" value="Cancel"/> Project Type Task Templates History << >>	
ID	9
Status	Active <input type="button" value="*Project Category Internal"/>
*Project Type	Employee Termination
Save <input type="button" value="Cancel"/> << >>	

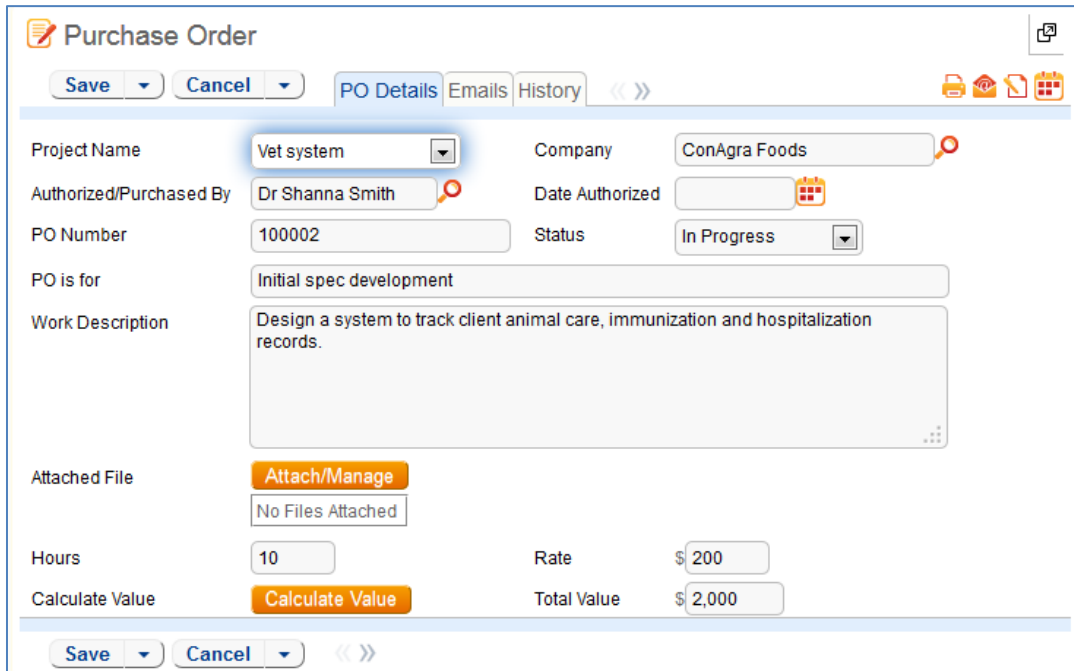
PURCHASE ORDERS (PO) TABLE

Purpose: 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

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

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

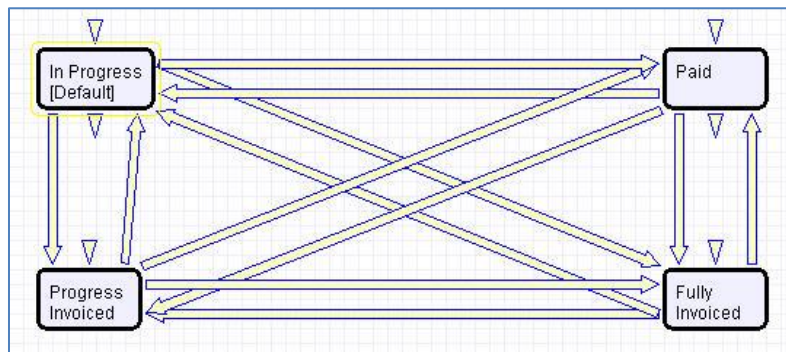


The screenshot shows a web form titled "Purchase Order". At the top, there are tabs for "PO Details", "Emails", and "History". Below the tabs are several input fields: "Project Name" (Vet system), "Company" (ConAgra Foods), "Authorized/Purchased By" (Dr Shanna Smith), "Date Authorized" (calendar icon), "PO Number" (100002), "Status" (In Progress), "PO is for" (Initial spec development), and "Work Description" (Design a system to track client animal care, immunization and hospitalization records). There are also buttons for "Attach/Manage" and "No Files Attached". At the bottom, there are fields for "Hours" (10), "Rate" (\$ 200), "Calculate Value" (Calculate Value), and "Total Value" (\$ 2,000). The form has "Save" and "Cancel" buttons at the top and bottom.

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



Default workflow for the Purchase Orders table

TIME ENTRIES TABLE

Purpose: 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 titled "Time Entry" with a clock icon. At the top, there are navigation buttons: "Save", "Cancel", "Time Detail" (highlighted), "Related Record", "Emails", and "History", along with left and right arrow icons. Below this is a header bar containing "ID 119" and "Related To" with a dropdown menu set to "Choose one". The main form area is titled "Time Details" and contains several fields: "*Time Spent" with input boxes for hours (H) and minutes (M); "Hours Spent" with a text input; "Done On" with a date field showing "Jan 23 2014" and a calendar icon; "Done By" with a dropdown menu showing "Agiloft Admin"; and "*Work Description" with a large text area. At the bottom of the form, there are "Save" and "Cancel" buttons and navigation arrows.

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.

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

Purpose: 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 'Billing' header with a dollar sign icon. Below it are 'Save' and 'Cancel' buttons. A navigation bar contains 'Billing Hours', 'History', and 'Communications' tabs, along with navigation arrows. The main form area includes: 'Done on' date pickers for 'Jun', '11', and '2010'; 'Done By' field with 'EW Admin' and a profile icon; 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' input field with '4' and 'Non Billable hours' empty input field; 'Date Created' and 'Created By' fields with 'Jun 11 2010 10:48' and 'EW Admin'; 'Date Updated' and 'Updated By' fields with 'Jun 11 2010 10:48' and 'System'; and a bottom bar with 'Save' and 'Cancel' buttons and navigation arrows.

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.

SALES CRM TABLES

LEADS TABLE

Purpose: 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 th

ID: 17 Status:

Assigned Team: Sales Rep:

Contact Information

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

Company Information

*Company Name	<input type="text" value="AT&T"/>	Company Role	<input type="text" value="Prospect"/>
Company Telephone	<input type="text" value="1-888-944-0447"/> Ext. <input type="text" value=""/>	Company Fax	<input type="text" value="333111111"/>
*Location Type	<input type="text" value="Headquarters"/>	*Location Name	<input type="text" value="AT&T"/>
Street Address	<input type="text" value="32 Avenue of the Americas"/>	City	<input type="text" value="New York"/>
Country	<input type="text" value="USA"/>	Zip or Postal Code	<input type="text" value="10013-2412"/>
US State	<input type="text" value="NY"/>		
Company Website	<input type="text" value=""/>		
Region	<input type="text" value="Western US"/>	Industry	<input type="text" value="Computer Hardware"/>

[Map it](#) [Find local hotels](#)

Campaign Name:

[Save](#) [Cancel](#) << >>

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 of 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

	How did you hear about us	does not equal, !=	Variable	\$NULL	now	
and	Campaign Name	equals, =	Variable	\$NULL	now	
and	Lead Created Via	equals, =	Value	Self-registration	now	

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.

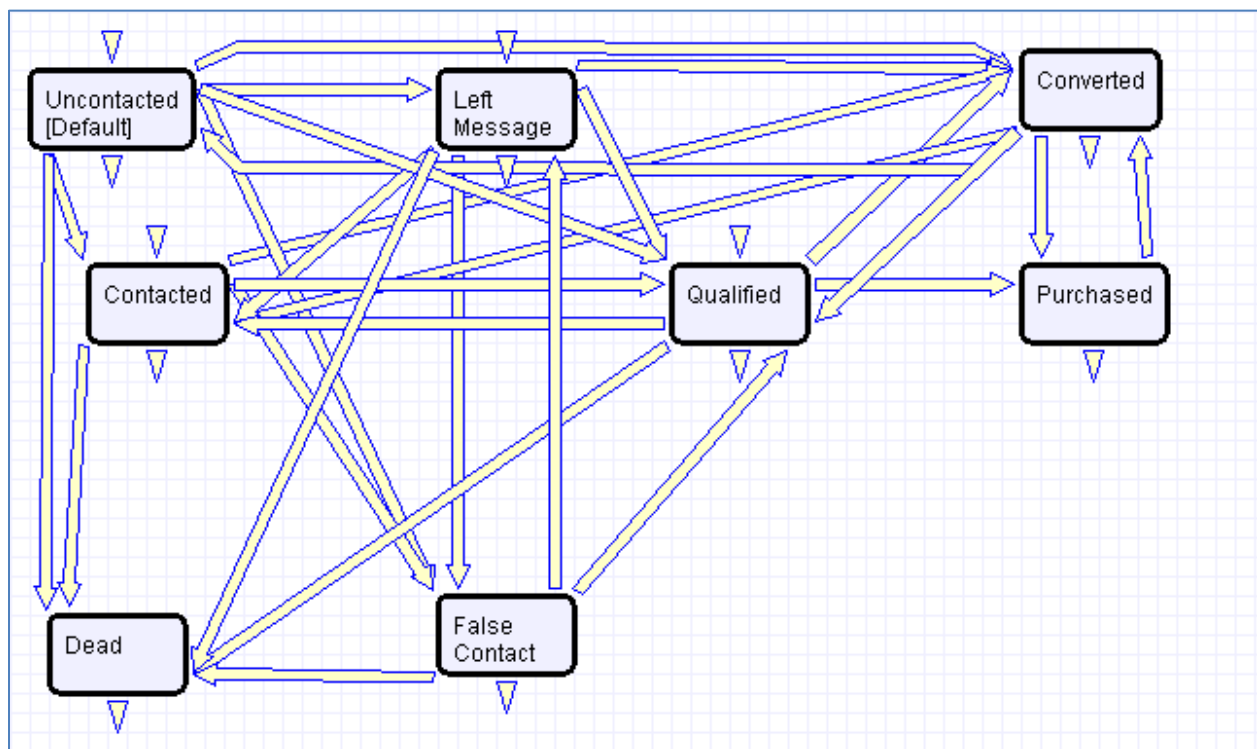
Priority: 1

Actions:

I: Set State Province

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

WORKFLOW



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 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

Purpose: 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.

Opportunity

Save Cancel Deal Info Related Records Account Info Emails History << >>

*Opportunity Name ID 119

*Company Main Contact

Sales Rep Status

Opportunity Information

Rating Products of Interest

Sale Value Probability of sale

Estimated Close Date Attached Contract or PO

Main Contact Email Main Contact Phone

Action Information

Actions Taken Next Action

Next Action Due

Sales Notes
contact them to arrange a custom sales demo

Save Cancel << >>

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**, so each record is associated with a particular user login from the People table.

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

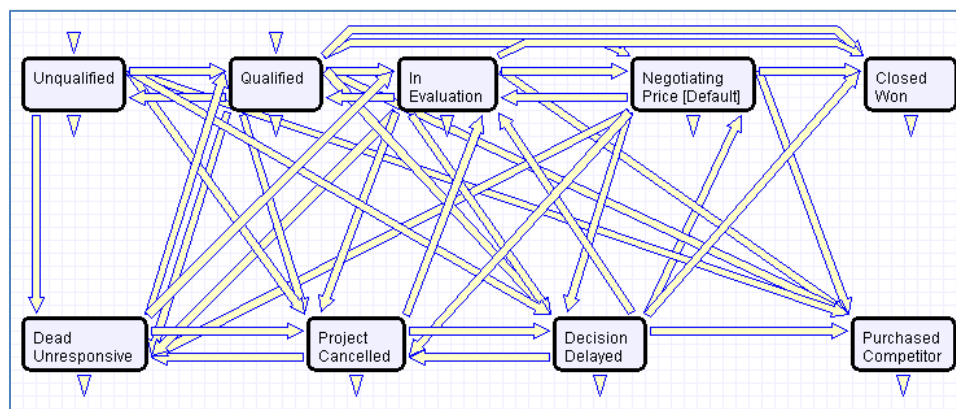
Priority: 2

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



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 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

Purpose: 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 titled "Campaign" with a navigation bar containing "Save", "Cancel", "Campaign Info", "Results", "Email Results", and "History". The form fields are as follows:

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 Main Contact			
Vendor Account Login	ourcompany@gmail.com	Vendor Account Password	123456		
Vendor Account Mgmt URL	www.google.com				
Date Launched	Apr 21 2012	Date Terminated			
Cost per Lead	\$ 2.50	Total Campaign Cost	\$		
Campaign Manager	EWSYSTEM	Manager Email			
Matches How did you hear about us	<input type="radio"/> Yes <input checked="" type="radio"/> No				

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.

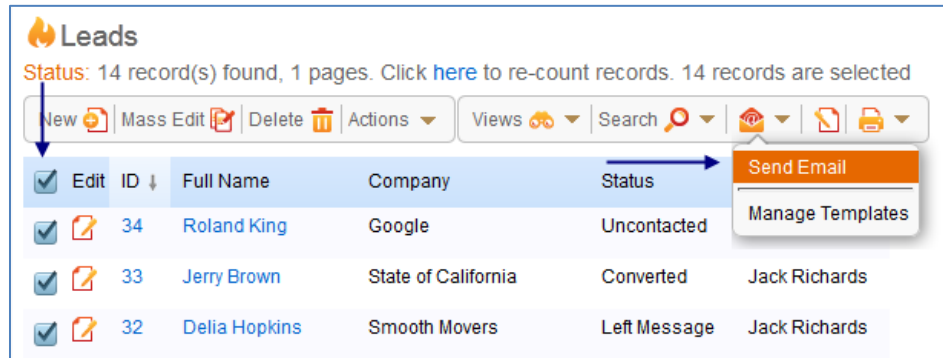
Processing of Records

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.

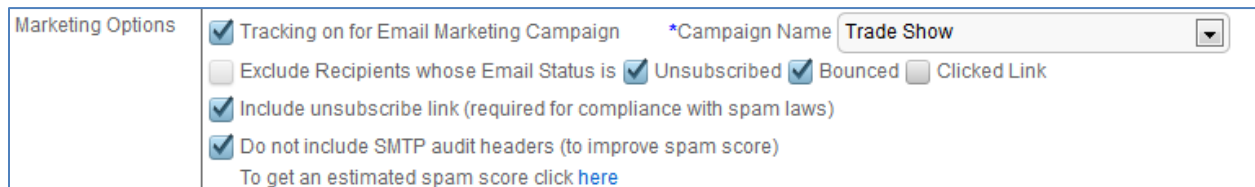
Email Marketing Campaigns

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.

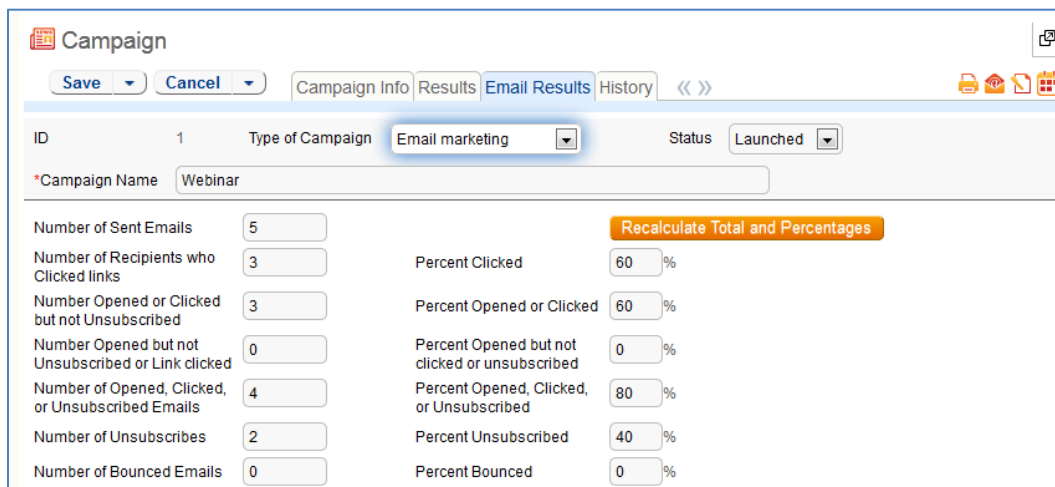
A marketing staff person sets up a Campaign to track results for a particular email. An email template may be created on the Leads and/or the People tables. Once the recipients are selected, mouse over the email icon and click Send Email:



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:



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:



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:

All Links Clicked

All Email Clicks

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

<input type="checkbox"/>	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			

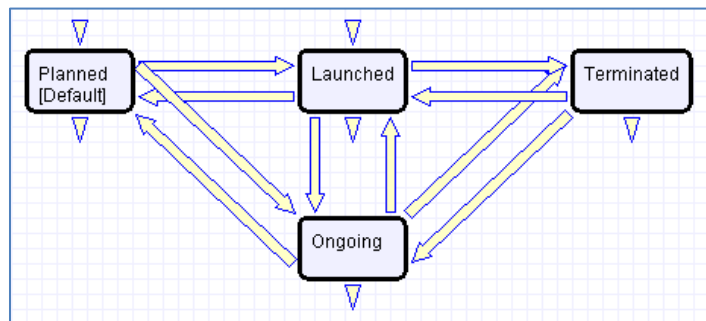
Total Number of Clicks 4 [Calculate](#)

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



REPORTS

The Campaign 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](#) << >>

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

Purpose: 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 Number:

Expected Order Date:

Quote Prepared By: Jack Richards

Quote Expires On:

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

Tax Rate: %

Additional Discount Given: Yes No

Discounted Total Before Taxes: \$

Attached Quote PDF: 1. 32_1345-2_IBM.pdf

Taxable Subtotal: \$599.00 Calculate

Sales Tax: \$

Total with Tax and Discounts: \$

Calculate Totals

Attach/Manage

Save Cancel

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 of Records

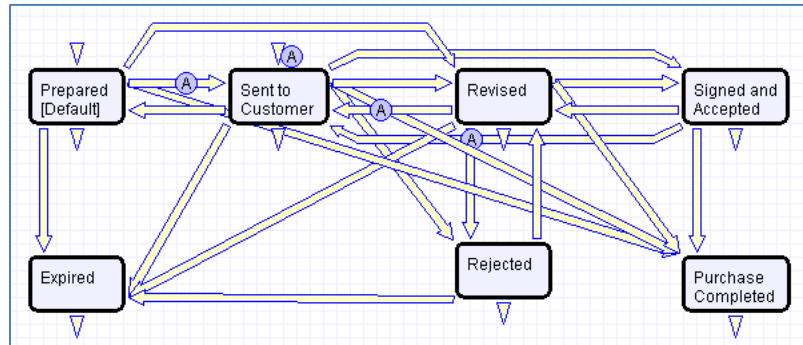
If the record is created and the **Status** is Prepared, the status can be changed to any one of the following states: Sent to customer, Expired, Revised, and Purchase Completed. If the status is changed to Sent to Customer at any time, a quote with the attached PDF will be emailed to the prospect.

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 workflow for Quotes is shown below:



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 TABLE

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

Product Quoted

Save Cancel Details Quote Details History Emails << >>

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	

Item Name: Socket wrench 33mm (dropdown) Item ID: 3

Item Number: 32423j2w63 Item Type: Part 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 No

Total Price: \$ 599.00

Taxable: Yes

Save Cancel << >>

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 of 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.

<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

Save
Cancel

Details
Orders
Emails
History
«
»

ID 4

Status Active Inactive *Product Type Part Software Service

Product Number

*Product Name

Description

A bolt used in small components of towers.

Type of Unit Unit Value

Price per Unit Taxable Yes No

Background

Date Created Created By EW Admin

Date Updated Updated By System

Save
Cancel

«
»

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 of 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

Purpose: 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 his/her 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 prepared to submit the record immediately, she can save the record 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 prepared to submit the record immediately, she can save the record 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 of Records

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

If there are any issues with the initial document, the Document Manager clicks the [Return to Submitter](#) action button to send the document back to a status of Draft. A rule will run to notify the [Submitter](#) that the document requires revision prior to submitting it for approval. The user then makes the appropriate updates and submits the document for review once again.

If the document does not require approval by document [Reviewer\(s\)](#), the Document Manager clicks the [Publish](#) action button. This will initiate a notification to the [Submitter](#) that the document has been published. A validation rule checks to see if the [Requires Approval](#) field is set to Yes, and notifies the Document Manager that the document requires approval if the Document Manager attempts to publish without 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 individuals belonging to the Document Reviewers Team. A search view will be provided to allow the Document Manager the ability to quickly see and sort on specific fields such as [Department](#).

After selecting the appropriate [Reviewer\(s\)](#), the Document Manager may click the [Submit for Approval](#) button, or change 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.

```
if (Status='Pending Approval' and Requires Approval='Yes' and Number of Potential Reviewers<1) {
  Must Provide Potential Approvers
}
```

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.

```
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
}
```

The system detects a change in this field and performs the conversion of the employee record to 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 actions will prevent the creation of multiple approval records allowing additional reviewers to be added during the approval process.

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.

The approval record is created with a default [Approval Status](#) of Pending Approval. 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.

Search Condition

Select saved search:

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

Selected Actions

U: Set Status to Draft
 E: Email Submitter Document Requires Update
 L: Set Document Rejected field to Yes in linked Approvals ▲

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.

```

if (Related To='Documents') {
  if (Source='Document Management') {
    if (Approval Notes changed from: any value to: any value during record's last modification) {
      Copy approval notes to Document
      Copy approval notes to running notes
      Blank approval notes
    }
    if (Document Rejected, Requires Update changed from: 'No' to: 'Yes' during record's last modification) {
      if (Approval Status='Rejected') {
        Set Document Rejected to No
      } else {
        Set Approval Status to Requires Reapproval
        Set Document Rejected to No
      }
    }
    } else if (Approval Status changed from: any of 'Rejected','Requires Reapproval' to: 'Pending Approval' during record's last modification) {
      Email Approver Requires Reapproval
      Blank approval notes
    }
  }
}

```

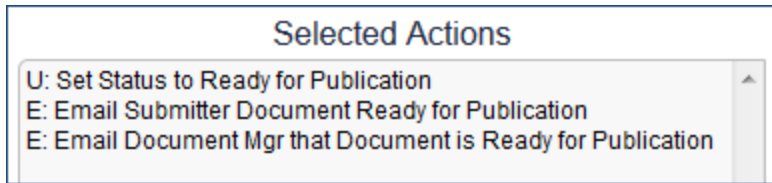
Since any rejected Approvals set the [Status](#) of the document back to Draft, the process essentially starts over. The [Submitter](#) can review the comments made by the reviewers and see any red-lined documents that have been attached to the approval records. Then the [Submitter](#) edits the document 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. When a Document that had been sent back to Draft from Pending Approval due to a rejected Approval goes back to the [Status](#) of Pending Approval again, the Approval Status of all linked Approvals will be set to Pending Approval just as before, and all [Reviewer\(s\)](#) will be notified via email.

When all of the approval records have been approved 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 and emails both the [Submitter](#) and Document Manager that the Document is ready for publication.

Search Condition

Select saved search:

R: Final Approval just received ▼



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 to see if there are still any pending approvals.

```
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  
    }  
}
```

When the Document is published, an email notification is sent to the [Submitter](#).

Document

Save Cancel

Details
Progress
Emails
History
<<
>>

ID 20
Status Published

*Title

Assigned Team Document Management Team
Assigned Person

Mark Retired

Document Details

Document Type FAQ

For Department Sales

Priority Medium

Purpose

This document will list all of the public events planned for this year.

Description

This document will list all of the public events planned for this year.

*Document Access Public

Department Manager Hector Gomez

Rush Yes No

Audience

Customers

Partners

Prospects

Employees

Vendors

Executives

Media

Analysts

Document Files

Source Files Attach/Manage

1. Desert.jpg

Published Format Choose one

Internal File URL

Published Files Attach/Manage

No Files Attached

Related Documents

Related Document(s) 🔍

Submitter Information

Submitter Karen Sneller
Submitter Department

Save
Cancel
<<
>>

Example of 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.

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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

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

Document Reviewers

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

AUTOMATION

All Edit Validations

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

Runs: When edited by email or web.

Search Filter: None.

Priority: 5

Actions:

I: All Edit Validations

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


Edit: Last Approval Received (API Enabled)

Purpose: This rule updates the [Status](#) and notifies the [Submitter](#) and [Document Manager](#) that the document is ready for publication.

Runs: When edited by email, web or API.

Search Filter: R: Final Approval just received

Priority: 5

Actions:

U: Set Status to Ready for Publication

Updated Field: Status

Updated Value: Ready for Publication

E: Email Submitter Document Ready for Publication

E: Email Document Mgr that Document is Ready for Publication

Edit: All Edit Actions without API

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

Runs: When edited by email or web.

Search Filter: None.

Priority: 1

Actions:

I: All Edit Actions

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

Create: All Creation Actions

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

Runs: When created by email, web or API.

Search Filter: None.

Priority: 1

Actions:

I: All Creation Actions

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

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

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

Runs: When edited by web or API.

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

Priority: 4

Actions:

U: Set Status to Draft

Updated Field: Status

Updated Value: Draft

E: Email Submitter Document Requires Update

L: Set Document Rejected field to Yes in linked Approvals

Chain: Document ← Approvals

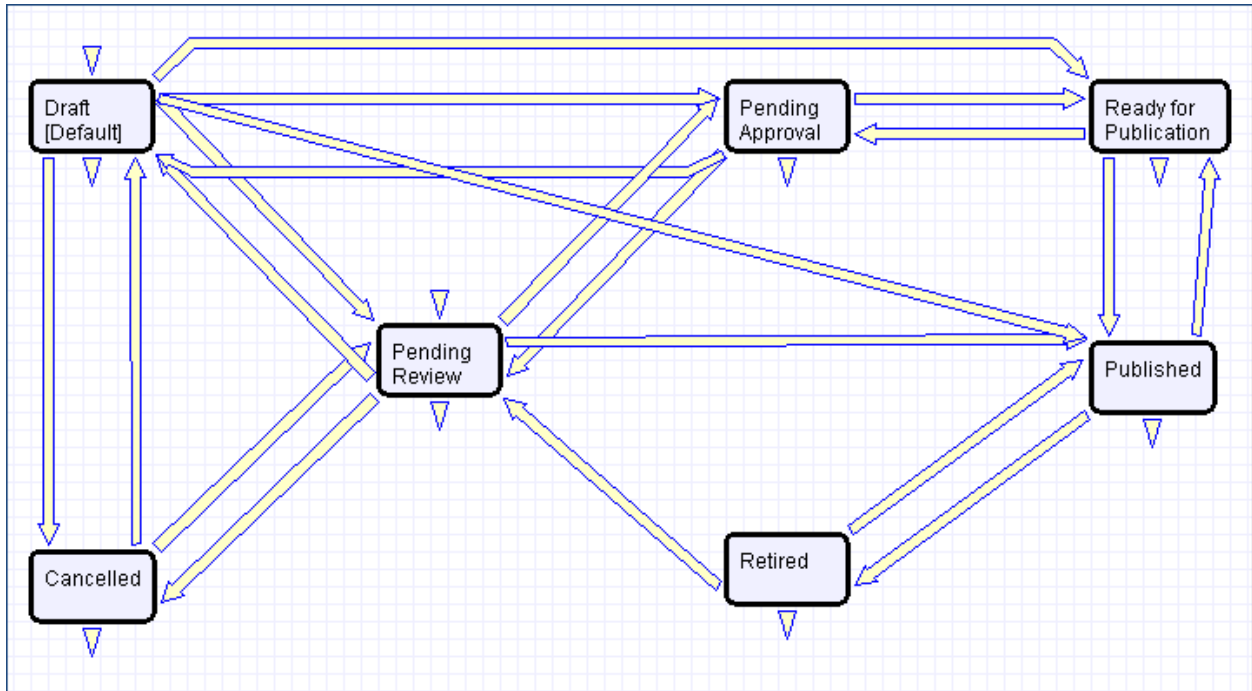
Linked Action:

U: Set Document Rejected to Yes

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

Updated Value: Yes

WORKFLOW



Workflow for Documents table.

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 **Contract Details** tab of the contract record and should be filled in during the contract process.

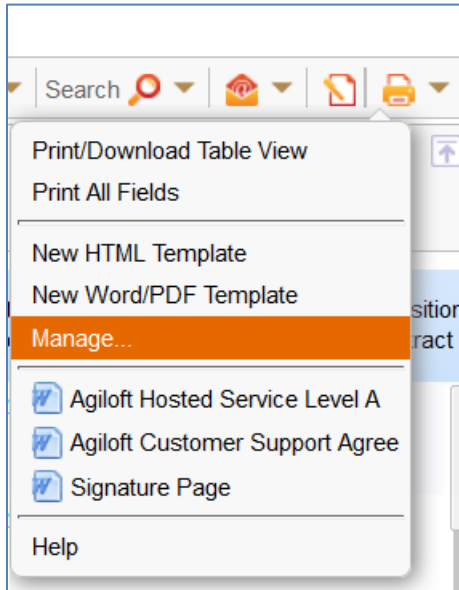
When the button is used to create the envelope, the user may click a **Create & Preview** button in the Envelope record to go directly to the envelope in DocuSign and preview everything before clicking the **Send** button to launch the signature process.

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

PRINT TEMPLATES

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

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



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

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

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

DOCUSIGN USERS TABLE

Purpose: 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:

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:

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: Add 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: 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

Purpose: 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:

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 Role Name
Customer3
Customer2
Customer1
InternalSigner

DOCUSIGN ENVELOPES TABLE

Purpose: 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.

The screenshot shows the 'DocuSign Envelope' interface. At the top, there are buttons for 'Save', 'Cancel', 'Envelope', and 'Status'. Below this are three main buttons: 'Create & Preview', 'Send', and 'Discard'. The envelope ID is 6e079346-1a78-4aa2-ab18-6a083af30014 and the status is 'Created'. The linked record is 'contract/238' with a sender of 'Dennis Sides'. The subject is 'Your signature is needed for contract: ABC Electronics Support Rent'. There is one attached document: '1. ABC_Electronics-238-rev2.docx'. Below this is a table of recipients with 3 records found.

ID	Send Order	Status	Full Name	Email	Title	Role Name	Message	Envelope
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...
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...
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 1 - DocuSign Envelope Screen

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

Purpose: 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 [6e079346-1a78-4aa2-ab18-6a083af30014](#)

*Full Name *Email

Title *Role Name

*Role

Access Code

Message

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.

Agiloft Request
📄

Save ▼ Cancel ▼
Details | Emails | History ◀ ▶
🖨️ 🏠 📄 🗑️

ID 1

*Type of Request Question about functionality ▼

Status Assigned ▼

Assigned To Agiloft Implementation Team ▼

Priority Medium ▼

List the type of record this request is about

*Table Name Support Cases

*Summary how do we do something

*Details/Steps to Reproduce Here are the steps.

Admin Only No ▼

If describing a problem with a particular record, please provide the id of the record

Record ID

Attached Files Attach/Manage

No Files Attached

Answers/Notes

*Email Behavior Send automatic emails ▼

Submitter Information

Submitter Name EWSYSTEM 🔍

Submitter Email

Additional CCs 🔍

Submitter Team Admin Team

Submitter Phone 415-232-4444

Save ▼ Cancel ▼
◀ ▶

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 of Records

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

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

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

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

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

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

OWNERSHIP

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

AUTOMATION

Create: All creation actions

Purpose: This handles all notifications for new requests.

Runs: When created by web, email or API.

Search filter: None

Priority: 1

Actions:

I: All new record actions

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

Edit: All edit actions no api

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

Runs: When edited by web or email.

Search filter: None

Priority: 2

Actions:

I: All edit actions

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

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

Purpose: This handles the reset of the email behavior.

Runs: When created or edited by web.

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

Priority: 3

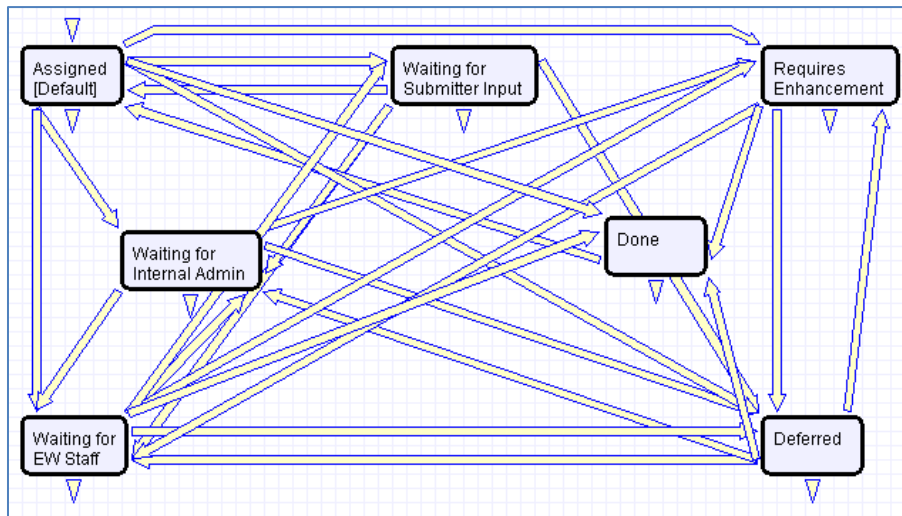
Actions:

U: Set Email behavior to send emails

Updated Field: Email Behavior

Updated Value: Send automatic emails

WORKFLOW



ACCOUNTING PERIODS TABLE

Purpose: 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.

The screenshot shows the 'Acct Period' form with the following details:

- ID:** 39
- *Accounting Period:** 2015-10
- *Date for Reporting:** Oct 31 2015
- Date Created:** Apr 09 2010 08:50
- Created By:** EW Admin
- Date Updated:** Aug 06 2012 14:19
- Updated By:** EWSsystem

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.

TASKS TABLE

Purpose: 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 web-based form for creating or editing a task. At the top, there's a title 'Task' and two buttons: 'Save' and 'Cancel'. Below that is a navigation bar with tabs: 'Task Details', 'Related Info', 'Time Spent', 'Emails', and 'History'. The main form area contains the following fields and controls:

- ID:** 163
- *Related To:** Project (with a magnifying glass icon)
- *Title:** Assign Implementers and Trainers
- Assigned Team:** Project Manager Team (dropdown)
- Assigned Person:** Sarah Connor (dropdown)
- Task Details Section:**
 - Status:** Incomplete (dropdown)
 - Task Type:** Task (dropdown)
 - Date Due:** (calendar icon)
 - Date Done:** (calendar icon)
 - Description:** (text area)
 - Attached File:** Attach/Manage button, No Files Attached
 - Working Notes:** (text area)

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

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

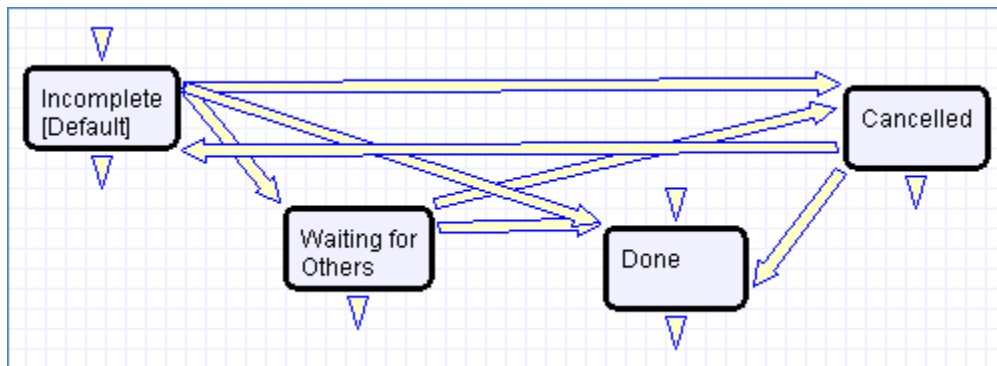
Actions:

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"/>	 	All Tasks, segmented by assignee		Yes	Jan 12 2014 15:06	Graphical chart, HTML	Standard
<input type="checkbox"/>	 	Assignee's tasks in the past month, segmented by type		Yes	Feb 26 2014 13:44	Graphical chart	Standard
<input type="checkbox"/>	 	Done Tasks, segmented by assignee	Closed Tasks	Yes		Graphical chart	Standard
<input type="checkbox"/>	 	Open Internal Project Tasks by Assignee	Open Project Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
<input type="checkbox"/>	 	Open Tasks, segmented by assignee	Open Tasks	Yes	Apr 01 2014 10:06	Graphical chart, HTML	Standard
<input type="checkbox"/>	 	Tasks by Company		Yes		Graphical chart	Standard

TASK TEMPLATES TABLE

Purpose: 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.

Default tab for a Task Template record.

The **Related To** field specifies the table for which a Task record is to be generated, and the Task Template record will hide or show choice lists (for instance, the **Project Type** field in the image above) pertaining to each option highlighted in **Related To**. **Template Status** is used to filter out retired or unused Task Templates from the options displayed in a Project or Helpdesk Case while retaining the Template in the system for later use. **Task Title** is the title inherited by any task generated by a particular template. The **Required or Optional** field is used primarily for the Projects table. A value of **Optional** means the user must manually choose to generate the task (the template will still be listed in the project for selection), while a value of **Required** will automatically create the task once the preceding task in the sequence is completed. **Preceding Template ID** and **Preceding Template Name** are used to design the sequence of Tasks. If left empty, the systems assumes the Task Template is a primary task, and will be launched first in the sequence. For more detail see the Projects Table or Helpdesk Cases section.

OWNERSHIP

Task Template records are owned by the user whose **Login** matches the **Creator Login** field.

AUTOMATION

Edit: Convert Template Task from helpdesk

Purpose: This handles the conversion of templates into tasks.

Runs: When created by web or API.

Search filter: R: Last HC ID Changed

Priority: 10

Actions:

C: Convert Template to New Task

Conversion: Task

Options: Silently with no confirmation

U: Add to All HC IDs

Updated Fields: All HC IDs Converted

Updated Values: \$last_hc_id_text+","

Edit: Trigger Task Creation from Project

Purpose: Runs a conversion to create a Task when a Project updates the [Last Project ID](#) field.

Runs: When edited by web or API.

Search Filter: R: Last Project ID Changed and is not contained in All Project ID's Converted

Priority: 2

Actions:

C: Convert Template to New Task

Conversion: Task

Options: Silently with no confirmation

U: Append Latest Project ID Text to field All Project IDs Converted

Updated Fields: All Project IDs Converted

Updated Values: \$last_project_id_text + ","

SURVEY FUNCTIONALITY

Agiloft has three special data types that can be used to create surveys or questionnaires on any subject. They work together to allow business users to create question "fields" with custom answer types and to combine these questions into a survey type that can be inserted into a table used to collect the questions' answers.

In the Demo KB, we have set this up to be used as a simple satisfaction survey for a service desk operation. The completed surveys are held in the Surveys table. A link to the survey can be emailed to customers when their Support Case or Helpdesk Case is closed, and we have included a sample email template for this purpose. The link must be modified to form the proper URL for your system before it will work.

It is also possible to embed a set of questions in any other table. For instance, one of our customers providing technical support to its engineering customers created a list of environment questions (questions) specific to each of its products (survey type). When a customer submits a ticket, they choose a product and then answer a set of questions related to that product within the support ticket.

It is also possible to store a set of answers and then load them (so the customer can store the environment answers in their company record, and then load them into their tickets).

SURVEYS TABLE

Purpose: 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 survey form titled "Survey". At the top, there are navigation tabs: "Questions" (active), "Numbers", "Related Records", "Emails", and "History". Below the tabs are fields for "ID" (18), "Survey Type" (Helpdesk Case), "Submitter Name" (Jack Richards), and "Submitter Company" (EnterpriseWizard). The main section 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, there are "Save" and "Cancel" buttons and navigation arrows.

USE CASE

Surveys are typically generated through a hyperlink in an email to a customer requesting their feedback.

The screenshot shows an email template with the following content:

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]

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

Purpose: This table contains templates that can be used to generate individual surveys.

Survey Type

Save Cancel Details History << >>

Survey Name: Helpdesk Case

Survey Definition: 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.

Edit Survey

Save Cancel << >>

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

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

USE CASE

These records represent the pool of questions available to be made into a survey from the Survey Types table. The **Edit Question** button in the record opens a wizard to assist in creating the question. On the **General** tab, the wizard allows the text of the question itself to be defined, as well as the type of response, which can be any of the field data types used in Agiloft. Various aspects of the question's presentation can be set here as well, and the question can be named if desired. Naming the question makes it searchable, but uses more resources on the server.

OWNERSHIP

Records are owned by the user whose [Login](#) matches the [Creator Login](#) for the record.

SYSTEM TABLES

These are special purpose tables, typically accessed only by the admin. Users will rarely interact directly with system tables, if at all.

System tables are detailed below in alphabetical order.

ACTIVITY LOG TABLE

The Activity Log table is a special table used by Agiloft administrators to monitor events such as Logins and modifications to the KnowledgeBase.

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	
		<< >>	

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

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.

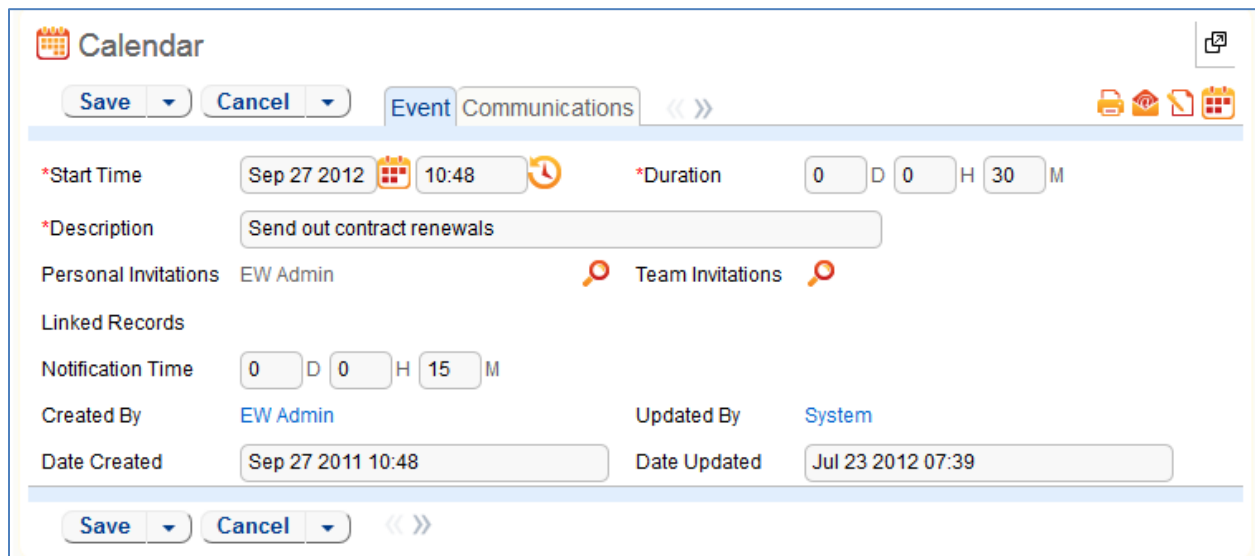
When viewing communications in this interface, users who are senders or receivers of these emails may see communications that were sent from other tables, such as a support case, a change request, users, and so on. Users can reply to or forward these emails directly from the All Communications table 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 shows a form titled "Calendar" with a calendar icon. The form has a top bar with "Save" and "Cancel" buttons, and a tab labeled "Event Communications". Below the tab are several input fields and controls:

- *Start Time:** Sep 27 2012 10:48 (with a calendar icon and 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 of the form, there are "Save" and "Cancel" buttons and navigation arrows.

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 that of the login 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 a 'Chat Log' form with the following fields and values:

- ID:** 1
- Type of Chat:** End User to Staff
- 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
- Acceptor Primary Team:** Support Team
- Start Time:** Aug 06 2012 14:03
- End Time:** Aug 06 2012 14:10
- Chat Duration:** 0 H 6 M 31 S
- Chat Session:** (empty field)
- Chat Transcript:** Hi, how can I login?

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.

New Mass Edit Delete Actions

Views Search

<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!!!!

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 name in 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.
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.
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.
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	No	Can delete only their own. Can view all that satisfy

Communications		search "P: Staff Record Emails and My Emails".
Emails	No	Can create and view all that satisfy search 'P: Staff Record Emails and My Emails'. Cannot edit or delete.
Activity Logs	No	Can view only their own.
Assets	No	Can create, edit all and view all. Cannot delete.
Campaigns	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Can delete only their own.
Documents	No	Can create, edit their own and those that satisfy search "I can approve". Can view all. Cannot delete.
Email Clicks	No	Can create, edit, delete and view all.
Groups	No	Can view only those that satisfy search "Customer Groups". Cannot create, edit or delete.
Helpdesk Cases	No	Can create, edit and view only their own. Cannot delete.
Insurance Certificates	No	Can create, edit and view all. Can delete only their own.
Leads	Yes	Can create, edit, delete and view all.
Locations	No	Can view all only.
Opportunities	Yes	Can create, edit, delete and view all.
People	Yes	Can create, edit and view all. Can delete only their own.
Employees	Yes	Can edit only their own. Can view their own and those that satisfy search "Active Employees". Cannot create or delete.
External Users	Yes	Can create, edit and delete only their own. Can view all.
Products	Yes	Can create, edit and view all. Cannot delete.
Products Quoted	No	Can create, edit and view all. Can delete only their own.
Projects	Yes	Can create and edit only their own. Can view all. Cannot delete.
Purchase Orders	No	Can create, edit and view all. Cannot delete.
Quotes	Yes	Can create, edit and view all. Cannot delete.
Support Cases	No	Can create and edit only their own. Can view all. Cannot delete.
Surveys	No	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create. Can edit and view their own and those that satisfy search "P: created by or assigned to me or my

		team". Cannot delete.
Task Templates	Yes	Can create and edit only their own. Can view all. Cannot delete.
Teams	No	Can view all only.

SALES

Table	Show Toolbar Tab	Details
All Communications	No	Can view only those that satisfy the search "P: Staff Record Emails and My Emails". Can delete only their own. Cannot create or edit.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own.
Assets	No	Can create, edit and view all. Cannot delete.
Campaigns	Yes	Can create, edit and delete only their own. Can view all.
Chat Logs	No	Can create, edit, delete and view all.
Companies	Yes	Can create, edit and view all. Can delete only their own.
Documents	No	Can create and view all. Can edit own and only those that satisfy the search "I can approve". Cannot delete.
Email Clicks	No	Can create, edit and view all. Can delete only their own.
Groups	No	Can view only those that satisfy the search "Customer Groups".
Helpdesk Cases	No	Can create, edit and view only their own. Cannot delete.
Insurance Certificates	No	Can create, edit and view all. Cannot delete.
Leads	Yes	Can create, edit, delete and view only their own.
Locations	No	Can view all only.
Opportunities	Yes	Can create and edit only their own. Can view all. Cannot delete.
People	Yes	Can create, edit and view all. Can delete only their own.
Employees	Yes	Can edit only their own. Can view their own and those that satisfy the search "Active Employees". Cannot create or delete.

External Users	Yes	Can create, edit and delete only their own. Can view all.
Products	No	Can view all only.
Products Quoted	No	Can create and edit only their own. Can view all. Cannot delete.
Purchase Orders	No	Can create, edit and view all. Cannot delete.
Quotes	Yes	Can create and edit only their own. Can view all. Cannot delete.
Support Cases	No	Can create and edit only their own. Can view all. Cannot delete.
Surveys	No	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create. Can edit and view their own and those that satisfy the search "P: Created by or assigned to me or my team". Cannot delete.
Teams	No	Can view only.
Time Entries	No	Can edit only their own. Can view all. Cannot create or delete.

SUPPORT MANAGER

Table	Show Toolbar Tab	Details
All Communications	No	Can edit and delete only their own. Can view own and only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot create.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own. Cannot create, edit or delete.
Assets	Yes	Can create, edit, view and delete all.
Billing	No	Can create and view all. Can edit and delete only their own.
Calendars	No	Can create, edit and delete only their own. Can view only their own and those that satisfy the search "My Appointments".
Change Requests	Yes	Can create, edit, delete and view all.
Chat Logs	No	Can create and view all. Cannot edit or delete.
Companies	Yes	Can view all only.

Contracts	Yes	Can view all only.
Email Clicks	No	Can create only.
Groups	No	Can view only those that satisfy the search "P: all groups except admin".
Helpdesk Cases	Yes	Can create, edit, delete and view all.
Locations	No	Can view all only.
Models	No	Can create, edit and view all. Cannot delete.
Opportunities	No	Can view all only.
People	Yes	Can create, edit own and view all. Cannot delete.
Products	No	Can view all only.
Products Quoted	No	Can view all only.
Projects	Yes	Can create, edit own and view all. Cannot delete.
Project Types	No	Can view all only.
Purchase Orders	No	Can view all only.
Quotes	No	Can view all only.
Repair Items	Yes	Can create, edit all and view all. Cannot delete.
Repair Requests	Yes	Can create, edit, delete and view all.
Software Apps	Yes	Can create, edit all and view all. Cannot delete.
Support Cases	Yes	Can create, edit, delete and view all.
Surveys	Yes	Can create and view all. Cannot edit or delete.
Tasks	Yes	Can create, edit own and those that satisfy the search "P: created by or assigned to me or my team or I am pm or support related". Can view all. Cannot delete.
Task Templates	Yes	Can create, edit own and those that satisfy the search "P: Related to is support case or helpdesk case". Can view all. Cannot delete.
Teams	No	Can view all only.
Time Entries	Yes	Can create, edit only those that satisfy the saved search "Done By = Name" and others. Can delete only their own. Can view all.
Workflows	No	Can create and view all. Cannot edit or delete.

SUPPORT STAFF

Table	Show Toolbar Tab	Details
All Communications	No	Can edit and delete only their own. Can view own and only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot create.
Emails	No	Can create and view only those that satisfy the search "P: Staff Record Emails and My Emails". Cannot edit or delete.
Activity Logs	No	Can view only their own. Cannot create, edit or delete.
Assets	Yes	Can create, edit and view all. Cannot delete.
Billing	No	Can create and view all. Can edit and delete only their own.
Calendars	No	Can create, edit and delete only their own. Can view own and only those that satisfy the search "My Appointments".
Change Requests	Yes	Can create, edit and view all. Cannot delete.
Chat Logs	No	Can create and view only their own. Cannot edit or delete.
Companies	Yes	Can view all only.
Contracts	Yes	Can view all only.
Email Clicks	No	Can create only.
Groups	No	Can view only those that satisfy the search "P: all groups except admin"
Helpdesk Cases	Yes	Can create, edit and view all. Cannot delete.
Locations	No	Can view all only.
Models	No	Can create, edit and view all. Cannot delete.
Opportunities	No	Can view all only.
People	Yes	Can create and edit only their own. Can view all. Cannot delete.
Employees	Yes	Can create and edit only their own. Can view all. Cannot delete.
External Users	Yes	Can create, edit and view all. Cannot delete.
Products	No	Can view all only.
Products Quoted	No	Can view all only.

Projects	Yes	Can edit only their own. Can view all. Cannot create or delete.
Project Types	No	Can view all only.
Purchase Orders	No	Can view all only.
Quotes	No	Can view all only.
Repair Items	Yes	Can create, edit and view their own and only those that satisfy the search "P: repair tasks created by or assigned to me or my team". Cannot delete.
Repair Requests	Yes	Can create, edit and view all. Cannot delete.
Software Apps	Yes	Can create, edit and view all. Cannot delete.
Support Cases	Yes	Can create, edit and view all. Cannot delete.
Surveys	No	Can create only.
Tasks	Yes	Can create. Can edit only their own and those that satisfy the search "P: created by or assigned to me or my team". Can view only their own and those that satisfy the search "P: assigned to me or related to helpdesk or support case or project". Cannot delete.
Task Templates	No	Can view all only.
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.
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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”.
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.