1.1 — Introduction and Overview
# CONTENTS

1. Introduction ........................................................................................................... 3  
   1.1 Concepts .......................................................................................................... 4  
   1.2 Using the Wiki .................................................................................................. 6  
   1.3 Get Help ........................................................................................................... 8  
      1.3.1 Send Large Files to Customer Support .................................................... 11
Welcome to the Agiloft help and documentation portal.

If you're new to Agiloft, this is a good place to get acquainted with our basic functionality. If you're already familiar with our software, you can use the search function to find answers to more complex questions. Agiloft provides a business software platform capable of automating any business process, improving customer relationships, managing workflows, and creating a secure, auditable space for your information. Our applications require no custom coding, which allows you to quickly create fully automated systems designed specifically to fit your company's needs. We currently have out-of-the-box solutions for:

- Service Desk
  - Customer Support
  - Internal Help Desk
  - Change Management
  - RMA Processing
  - Asset Management
  - ITIL Service Desk and ITSM
- Contract Management Software
- Workflow and BPM
  - Custom Workflows
  - Project and Task Management
  - Custom BPM
- License Generation
- Sales Force Automation
- Customer Relationship Management (CRM)
- Time Tracking

The following guide serves as a reference for the building blocks of Agiloft. We begin by introducing the basic components and then move into more detailed explanations of functionality. Because many of these concepts and terms crop up frequently in our documentation, our program text, and conversations with our support staff, it's helpful to understand how all the pieces fit together. Included are examples and videos designed to deepen your understanding of the program and answer fundamental questions about how the system works. To begin, we'll introduce the concepts.
# Concepts

This topic describes some of the high-level concepts in Agiloft.

<table>
<thead>
<tr>
<th>Concept</th>
<th>Brief Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>An administrator is a user who belongs to at least one group that is an administrator group. Administrators use the advanced capabilities of Agiloft to create, administer, and maintain knowledgebases. See: <a href="#">Administrator Guide</a>.</td>
</tr>
<tr>
<td>Knowledgebase (KB)</td>
<td>A knowledgebase (KB) is a particular deployment of Agiloft. It contains the entire collection of tables, records, teams, groups, views, reports, and associated data. A given Agiloft installation may include multiple KBs, but each KB is logically independent. Knowledgebases can be exported as a single file in XML format and imported onto another server. The system administrator of one KB cannot overwrite another.</td>
</tr>
<tr>
<td>Field</td>
<td>Fields represent the different types of information stored within tables, such as a telephone number. Fields correspond to columns in the database and in table views. See: <a href="#">Fields</a>.</td>
</tr>
<tr>
<td>Record</td>
<td>A collection of field values. See: <a href="#">Working with Records</a>.</td>
</tr>
<tr>
<td>Workflow</td>
<td>Workflows control record states and the rules that apply when a record moves from one state to another. It may refer to the graphical workflow editor used to create and manage workflows in the Table wizard. See: <a href="#">Workflows</a>.</td>
</tr>
<tr>
<td>Table</td>
<td>Tables organize your information within the knowledgebase. A table is the whole set of fields, relationships, and rules on which individual records are based. Tables represent an object in the database with columns, or fields, and rows, or records. Knowledgebases typically contain several different standard and custom tables, such as Leads, Users, Companies, Support Cases, Contracts, and so on. See: <a href="#">Tables</a>.</td>
</tr>
<tr>
<td>Subtable</td>
<td>Subtables are made up of specifically defined records within a larger table. Tables can be hierarchical and inherit fields and rules from their parents. For example, Employees and External Users might be subtables of the People table, in which case they would automatically contain all the fields from People table as well as their own unique fields.</td>
</tr>
<tr>
<td>Grouping</td>
<td>A grouping is a set of tables or items with a similar function. For example, your knowledgebase might have a Contract Management grouping that contains the Contracts, Approvals, Attachments, and Tasks tables.</td>
</tr>
<tr>
<td>Nav Bar</td>
<td>The nav bar is at the top of the knowledgebase and displays the menu icon, tables, and other navigation options, such as the Last Opened list, My Assigned records, and Chart Collections. See: <a href="#">Nav Bar</a>.</td>
</tr>
<tr>
<td>Left Pane</td>
<td>When the nav bar is placed on the left side of the knowledgebase, it turns into the left pane. The left pane displays tables and navigation options similar to the nav bar. See: <a href="#">Left Pane</a></td>
</tr>
<tr>
<td>Group</td>
<td>Groups help secure your instance of Agiloft by defining the access permissions that each user has. Group permissions define which tables, records, and fields that users may view or edit, as well as their access to special menu permissions like exporting and setup options. See: Groups.</td>
</tr>
<tr>
<td>---------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Team</td>
<td>Teams are used to identify working units of users, such as those that share a role in the system. Teams are used to send email notifications, define working hours, and determine aspects of the interface such as Views and Saved Searches. Users are assigned to a Primary Team and additional teams if necessary. See: Teams.</td>
</tr>
<tr>
<td>Report</td>
<td>A summary of record information that may be presented in graphical, HTML, text, or Excel format. See: Reporting.</td>
</tr>
<tr>
<td>Search</td>
<td>A filter applied to a table to find specific information. For example &quot;Find all Support Contracts that are due to expire within the next 30 days&quot;. See: Searching.</td>
</tr>
<tr>
<td>Table View</td>
<td>A table view is what users see when they click on a table from the Left Pane. It includes a view of the records contained within the table as well as the table name, table summary, action bar, and table search block. See: Table View.</td>
</tr>
<tr>
<td>View</td>
<td>A view determines which fields from a type of record are shown in a list of records in the table view. Views can include row coloring by issue, search filters, and custom column settings. For example, a &quot;Company Name, End Date, and Value&quot; view would show those specific fields from Contracts. See: Views.</td>
</tr>
<tr>
<td>Rule</td>
<td>A statement of business logic that Agiloft executes automatically. See: Rules and Workflows.</td>
</tr>
<tr>
<td>Wizard</td>
<td>A wizard is a series of screens and tabs in which you can select options for configuring a specific part of the system. When working in any Agiloft wizard, the left side of the screen has a description of each option, as well as tips and guidance and links to additional information. Wizards are most often used by Agiloft administrators.</td>
</tr>
<tr>
<td>Power User</td>
<td>A power user is a user who belongs to at least one group that is a Power User group. Power users can access charts and reports and edit other people's records. They require an assigned power-user or floating power-user license. See: Power User Guide.</td>
</tr>
<tr>
<td>End User</td>
<td>An end user is a user who belongs only to a group that is an End User group. End users cannot edit other people's records. They may use an unlimited end-user license.</td>
</tr>
</tbody>
</table>
Using the Wiki

The Agiloft Wiki is an online help system for the entire Agiloft platform where users can find instructions and answers about system functionality, as well as administrator and developer content for customizing and extending your system. The Help Wiki stays up-to-date with Agiloft’s development and documents the features available in the most current release version.

Click the Agiloft logo in the top-left corner at any time to get back to the Topics home page.

Searching

Searching is the most powerful tool for finding the information you need in the Wiki. The Search bar at the top right of the screen provides full text search, as well as more advanced search capabilities using the search query syntax. Use quotes to search exact phrases.

To learn more about advanced searches, click the question mark icon to the right of the search box to open the Search Help window.

Navigating the Wiki

The table of contents is organized to allow you to locate relevant information quickly, according to the level at which you are using the system.

The levels of the table of contents are organized as follows:

- **Introduction** - Introductory topics related to Agiloft and some fundamental system concept definitions.
You can open the Wiki from a few places in Agiloft:

- Click the question mark icon in the top-right corner to open the Wiki to the Topics landing page.

Whenever you see Help in a drop-down menu or see the question mark icon in the interface, click them to open the Wiki to the relevant page.

We'd love to hear from you! Send questions and other feedback to docs@agiloft.com.

It is possible to customize the Help from within a knowledgebase by navigating to Setup > System > Customize Help. You can add a link to additional documentation specific to your Knowledgebase, or remove the other links from the Help drop-down.

In the Setup Help screen, the administrator can set a different primary help location if they do not want the primary URL to be https://wiki.agiloft.com. For example, setting the primary location to MyCompanyWiki.agiloft.com would cause all topics to be redirected with MyCompanyWiki.agiloft.com as the base URL - so the current topic would become https://MyCompanyWiki.agiloft.com/display/Help/Using+The+Wiki. This is primarily to be used for branding purposes, and should be requested through the Support Portal.
Get Help

To reach Agiloft for help, start by signing up for a user account at the Support Portal. From there you can view release notes and FAQs, submit and vote for enhancement ideas, and contact customer support and the implementation team. All users, including Free Edition users, can submit tickets and receive support for questions about standard features. You can also request configuration changes to your system from the implementation team.

Submit support tickets for system malfunctions or bugs; submit implementation tasks for configuration changes, or for help implementing new features. If you aren't sure, choose either option and make sure to be specific about your needs when you complete the form. We can convert one type of request to the other if necessary.

⚠️ Advice on system design and troubleshooting complex configuration errors is outside the scope of standard support and you may need an active Purchase Order in order to allow the implementation specialist to work on your issue.

Submit Tickets to Support

After logging in to the support portal, click Submit a Ticket on the home page.

Fill out the form and a support representative will get in touch with you.

Ticket Guidelines

Clear instructions are key to getting issues resolved quickly. Follow these guidelines to write clear steps to reproduce your issue. In the Steps to Reproduce field, go through the issue step by step, with one step per line.
For example, a bug report with this description is typically resolved faster:

**Good Description**

1. Log into KB_NAME on SERVER_NAME as USER using BROWSER
2. Go to the Support Case table
3. Edit record with ID 32
4. Change Status field from Open to Closed
5. Click Finish

Result: Error message 'XXX' and no fields are updated.

Expected Result: Support case is successfully updated.

In comparison, this description would likely require more information from you before the issue could be resolved:

**Poor Description**

When I try to close a ticket, I get an error message. This has been happening for the past three days.

Whenever possible, describe how to reproduce a problem, not just the results of the problem. The step-by-step details are critical. It's also helpful to include the browser you were using when the issue occurred, which helps us interpret the log files and determine whether plug-ins are involved.

In addition, keep the following in mind when submitting tickets:

1. Submit only one issue per ticket. Different issues usually require different resources, and one ticket can only be assigned to one person at a time. If you submit a ticket with multiple issues, the support team might create additional tickets to track separate issues, or request that you do so.
2. Reply and keep responses within the original ticket, and use that same ticket for any escalation as needed.

**Important:** Do not open a new ticket for the same issue. Rather than increasing urgency, multiple tickets for the same problem can actually delay resolution because the team spends extra time investigating the new ticket as a new issue, usually repeating steps that have already been taken. It also means something relevant to solving the overall issue will be recorded in one ticket and not another. It also obscures when the original issue occurred, which can sometimes be relevant to solving the issue. Finally, the latest ticket will always appear to be new and therefore less urgent to resolve than a ticket that has been open for some time.
Further Support

In some cases, we may refer your ticket to the implementation expert who originally configured your KB. Note that advice on system design and troubleshooting complex configuration errors is outside the scope of standard support and you may need an active Purchase Order in order to allow the implementation specialist to work on your issue.

For some issues we may request system logs or other files from you to effectively troubleshoot the issue. To share files larger than 20 MB with the support team, see Send Large Files to Customer Support.

Submit Implementation Tasks

After logging in to the support portal, click Submit Implementation Task on the home page.

Fill out the form and an implementation expert will get in touch with you.

1. At the top, check your contact information and make sure it’s correct.
2. In the Task Description field, be as specific as possible about your request and what you need help with.
3. In the Funding Source field, select whether you have an open PO you want to use.
4. Select a priority and date needed.
5. In the Task Tags field, use the lookup icon to select applicable topics.
6. Attach any files, logs, specs, or screenshots that would be helpful in describing your task.
7. Click Save.
Send Large Files to Customer Support

Agiloft offers various ways to send files to the support team so we can help diagnose and troubleshoot issues. Files up to 20 MB in size can be directly attached to the support case record in the section for Attached Files. For larger files or those containing sensitive data, you can connect via FTP or SFTP (Secure File Transfer Protocol).

FTP is a protocol to send files over the internet, while SFTP offers an added layer of authentication and security. To complete these steps, you will need a file transfer client such as WinSCP. If you need help configuring WinSCP, see their online help.

**GDPR Impact**

If you are hosted in the EU, sending EU data to these FTP and SFTP servers is not compliant with GDPR. If this applies to you, let your support representative know so we can use an alternate method to resolve your issue.

Connect to FTP or SFTP

Connect to the FTP server using a tool such as WinSCP using the following credentials:

For FTP...

- Hostname: ftp.agiloft.com
- Username: anonymous
- Port: 21 (default)
- Password: none (leave blank)

For SFTP...

- Host name: ftp.agiloft.com
- Username: sftp
- Port: 22 (default)
- Password: 83d54%40pnUwAMdvU&
Upload Files

When you've connected to the FTP or SFTP server, you can upload the files:

1. Navigate to your files in the local side of the application.
2. Drag and drop the files to the "incoming" folder in the server side of the application. It should take only a few minutes to upload, except for very large files. If you receive a duplicate name error, rename your files and repeat this step.

Make sure to drag your files to the folder, rather than trying to open it. You can't access the contents of the folder, so you can add files only from this view.