



Jennifer Ross & Dick Miller Implementation Specialists

The screenshot shows the Agiloft software interface. The top navigation bar includes the Agiloft logo, a search bar, and user information. The main content area displays a 'People' table with the following data:

Edit	ID	Full Name	Primary Team	Company	Direct Phone
	449	John Steinbeck	Finance Team	Agiloft	555-111-7567
	447	Edgar Poe	Service Management Team	Agiloft	555-222-1111
	445	William Shakespeare	Change Approver Team	Agiloft	555-323-5555
	441	Cathy Dupont	Customer Team	Apple Inc	555-965-9333 Ext.412
	439	Michael Johnson	Customer Team	Agiloft	555-234-1234
	437	Maurice Sendak	Customer Team	Acme Micro	555-344-5555
	434	Business Admin	Admin Team	Agiloft	555-987-6543
	431	Helen Jensen	Contract Creator Team	Agiloft	555-333-1111
	420	Richard Morton	Project Manager Team	Agiloft	555-444-5555
	414	John Martin	1st Level Support Team	Agiloft	555-886-4005
	410	Ma Lazano	Document Creator Team	Agiloft	555-555-6666

Agenda

1 Look and Feel Editor

2 Styles Demonstration

3 Graphical Data Elements

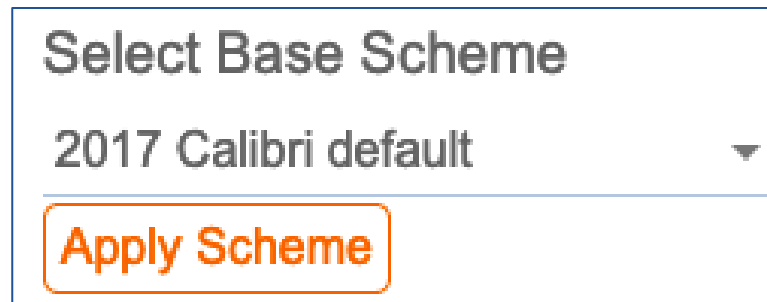
4 Data Elements Demonstration



Look and Feel Editor

Look and Feel Overview

- The look and feel wizards allow you to customize many styles in the interface. This includes fonts, sizes, colors, hover effects, borders, margins, padding, and icons.
- Users can have different look and feel schemes depending on their primary teams.
- To copy a look and feel scheme, create a new scheme, select the scheme to copy from, and click Apply Scheme.



Select Base Scheme

2017 Calibri default ▼




Apply Scheme

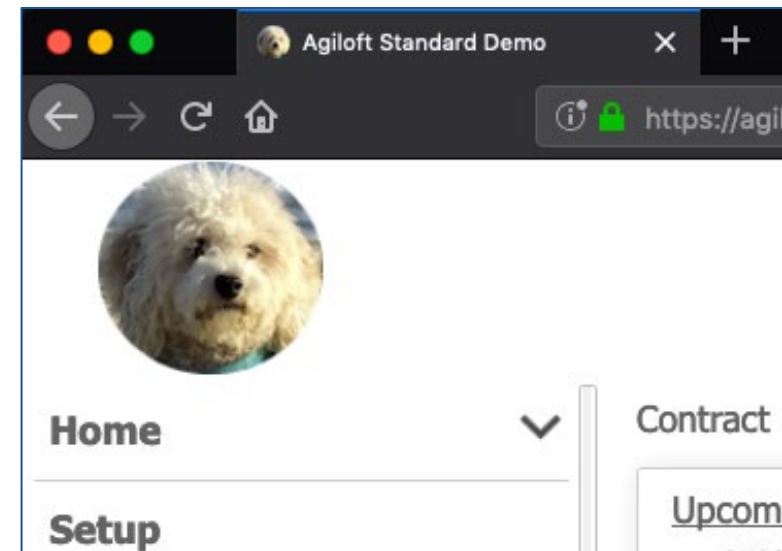
- Some of the end user interface is controlled by EUI pages.

Look and Feel Wizard: Global

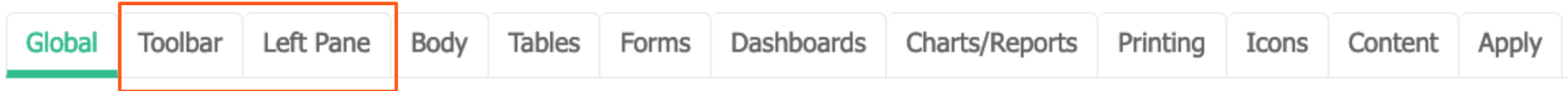


- On the Global tab of the look and feel wizard, you can define a list of **fonts** to be used in the interface and upload custom fonts.
- You may also define a list of up to 20 **colors** to reference when applying colors to different interface elements.
- If you copy from an existing scheme, adjust the colors here to have those changes applied everywhere those colors are used.
- The Global tab is also where you can upload a **logo** and a **shortcut icon**.

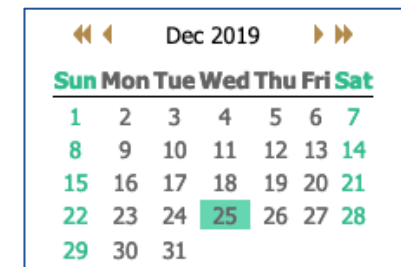
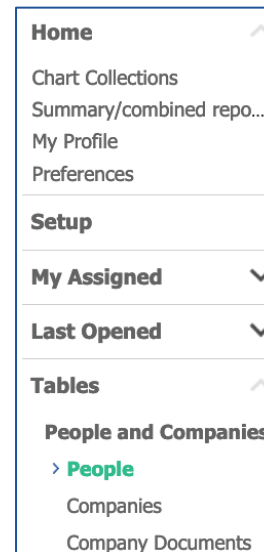
Color 1		User defined ▾	# 3FB98E
Color 2		User defined ▾	# 6ED3B3
Color 3		User defined ▾	# E3FAF0



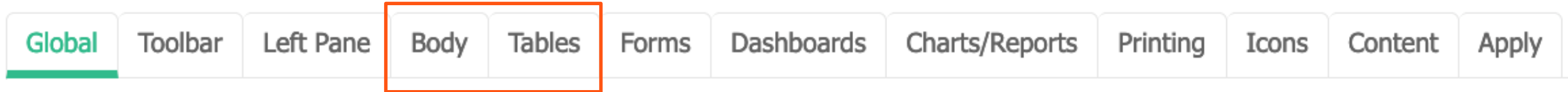
Look and Feel Wizard: Toolbar, Left Pane, Body, Tables



- **Toolbar:** tabs that appear at the top of records and wizards
- **Left Pane:** left pane items and calendar popup



Body, Tables



- **Body:** background color, top right menu and search box
- **Tables:** table view elements, including the action bar, table header, and list of records



Contracts

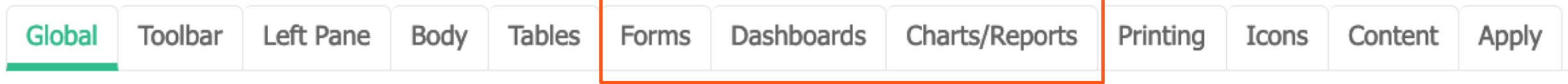
Status: 19 record(s) found, 1 page(s). Click [here](#) to count records again..

New Mass Edit Delete Actions

Views Search

Edit	ID	Contract Title	Company Name	Status	Internal Contract Owner	Contract End Date
<input type="checkbox"/>	204	Consulting for IT Deployment project	IBM	Active	Robert Barash	Aug 15 2019
<input type="checkbox"/>	202	Master Services Agreement with IBM	IBM	Active	Robert Barash	
<input type="checkbox"/>	189	Agiloft NDA	Agiloft	Pending Contract Manager	Helen Jensen	Sep 01 2029
<input type="checkbox"/>	188	Amendment to support contract for Acme Fremont	Acme Micro	Draft	Jared Smith	Aug 09 2021
<input type="checkbox"/>	178	Maintenance subcontract Amendment with Acme Micro for SF office	Acme Micro	Pending Approval	Jared Smith	Oct 01 2019
<input type="checkbox"/>	148	Acme NDA	Acme Micro	Active	Robert Barash	Mar 28 2019
<input type="checkbox"/>	145	NDA for Acme Micro	Acme Micro	Pending Approval	Helen Jensen	Sep 28 2020
<input type="checkbox"/>	95	Peoplesoft Customer Support Contract	Peoplesoft	Draft	Robert Barash	Jun 16 2020
<input type="checkbox"/>	69	Customer service for one year	Agiloft	Active	Robert Barash	Nov 28 2019
<input type="checkbox"/>	43	Maintenance subcontract for SF desktop computers with Acme Micro	Acme Micro	Active	Jared Smith	Nov 01 2019

Look and Feel Wizard: Forms, Dashboards, Charts/Reports



- **Forms:** record styles, including field labels, action buttons, navigation buttons, headings, and help text
- **Dashboards:** style of widgets and dashboards
- **Charts/Reports:** chart colors and report styles

File Upload

Attachment Type to Upload

File(s) to Upload [Attach/Manage](#)

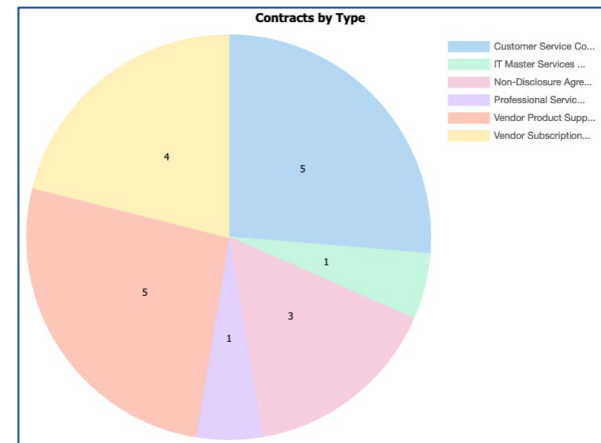
Drag&Drop files

Add File

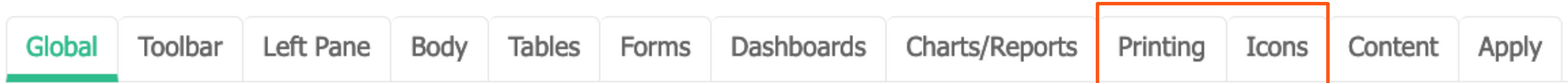
ServiceDesk Home Page

Quick Links

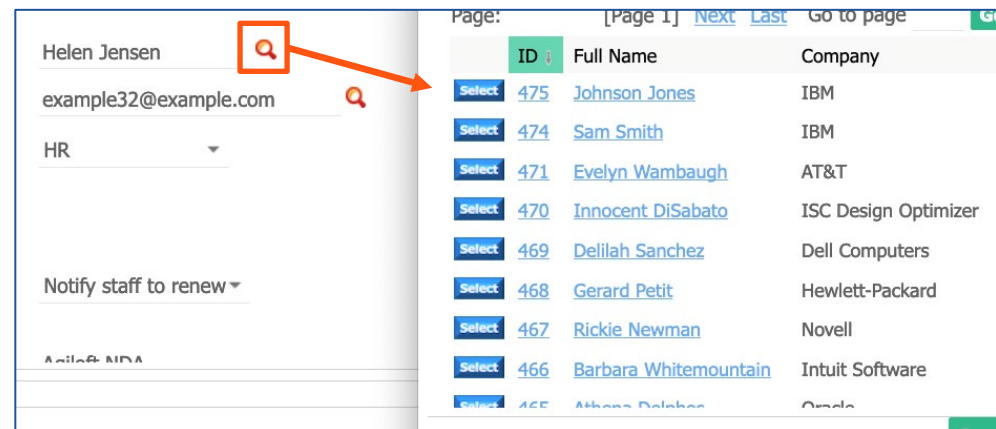
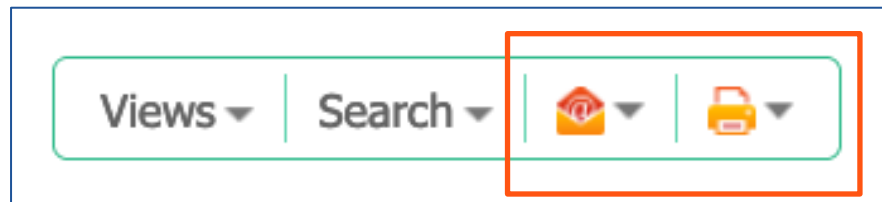
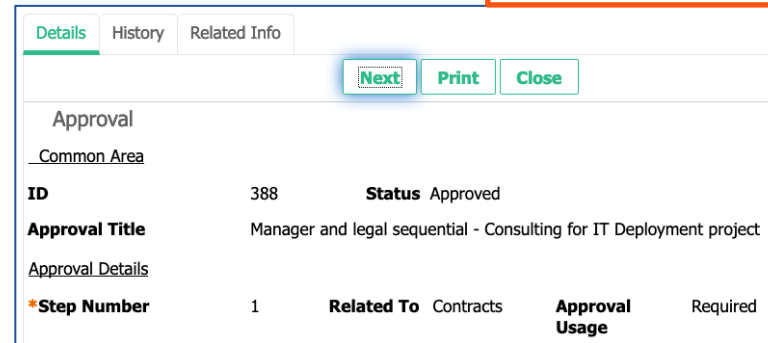
- Request a Password Reset
- Create a Service Request



Look and Feel Wizard: Printing, Icons

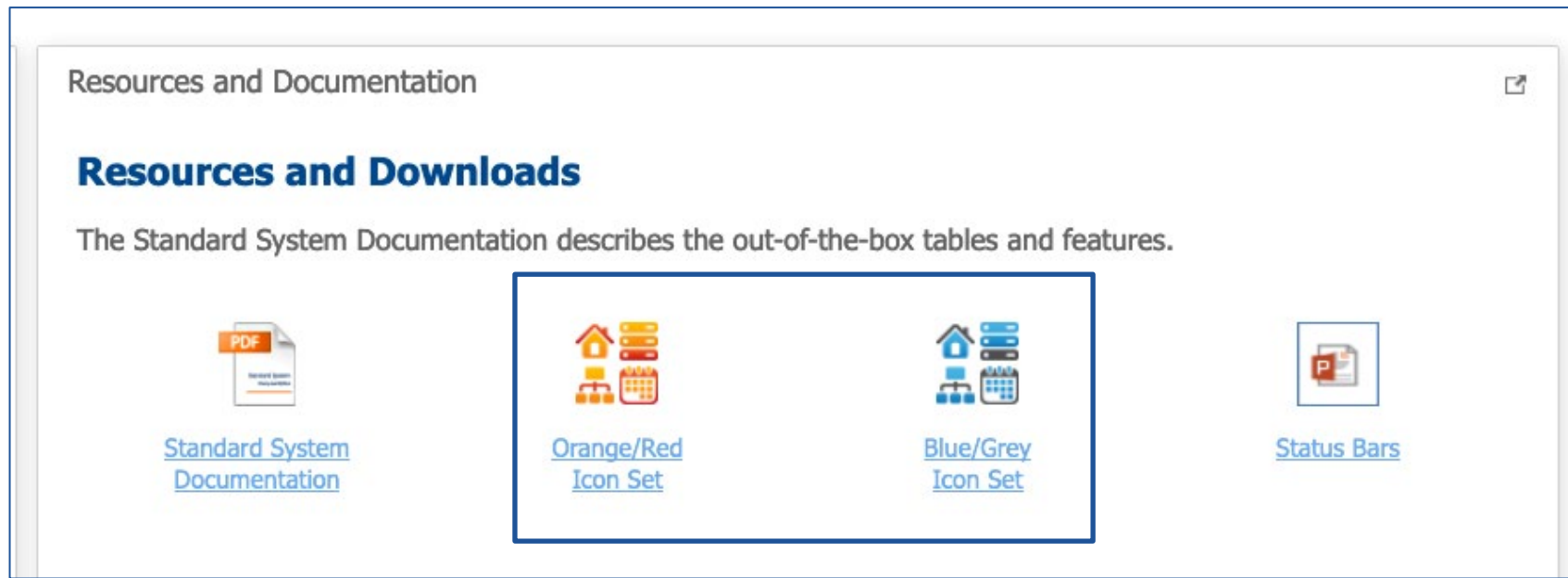


- **Printing:** style used for printouts, including background color, fonts, and font styles
- **Icons:** icons used throughout the system, such as in action bars

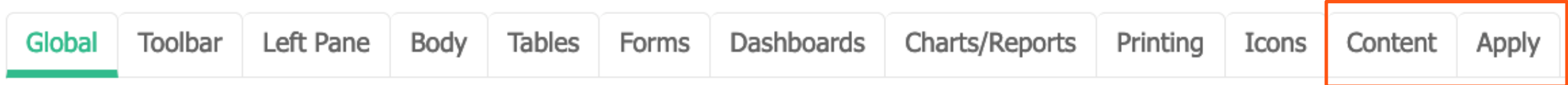


Icon Sets

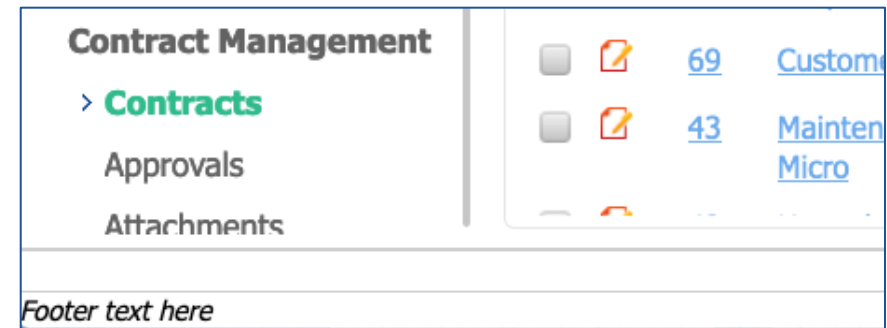
- A widget on the Admin Welcome homepage contains two icon sets that can be downloaded and used in the interface. The blue/grey icon set can be used to replace the standard orange icons.



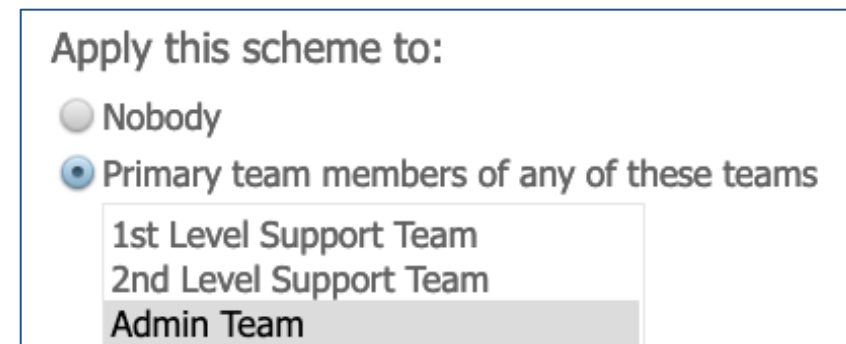
Content, Apply



- **Content:** HTML headers and footers

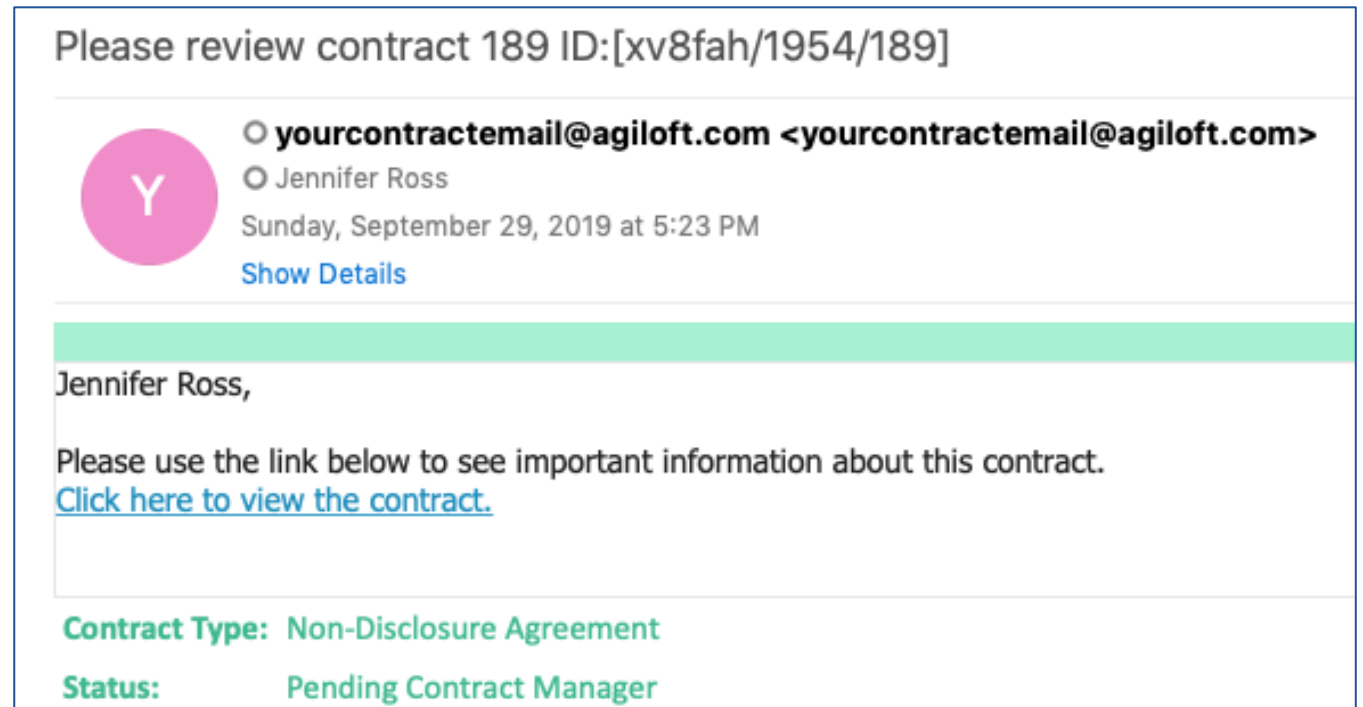


- **Apply:** select the teams who use this look and feel scheme



Email Look and Feel

- The following can be modified for email templates sent from the system:
 - Fonts
 - Hyperlinks
 - The “included fields” section



Required Field Style

- By default, required fields have a red asterisk before the field label. The following attributes of required field styles can be customized:
 - Position of the asterisk
 - Size of the asterisk
 - Color of the asterisk
 - The asterisk itself (can use another symbol or text)
 - The color of the field label

Renewal Type	Notify staff to renew ▼
*Contract Title	Agiloft NDA

Renewal Type	Notify staff to renew ▼
*Contract Title	Agiloft NDA

Renewal Type	Notify staff to renew ▼
[REQUIRED]Contract Title	Agiloft NDA

Page Header

- Another formatting option is to add header text to right of the search bar in the power user interface. This can be used to help distinguish between development and production systems.

Search all tables...

Go

TEST SYSTEM

Welcome Agiloft

English

jmr demo master

Logout

Help

Left Pane Groupings

- Headings can be added to the left pane to group tables that are functionally similar.
- Different left pane groupings can be applied to different users based on their primary teams, and individuals with access to change their preferences can have their own personal groupings.
- Other left pane items such as Last Opened and My Assigned can be rearranged and hidden from the left pane.
- Separator lines can be added to further distinguish different areas of the left pane.

Tables

People and Companies

People

Companies

Company Documents

Locations

Departments

Roles

Contract Management

Contracts

Approvals

Attachments

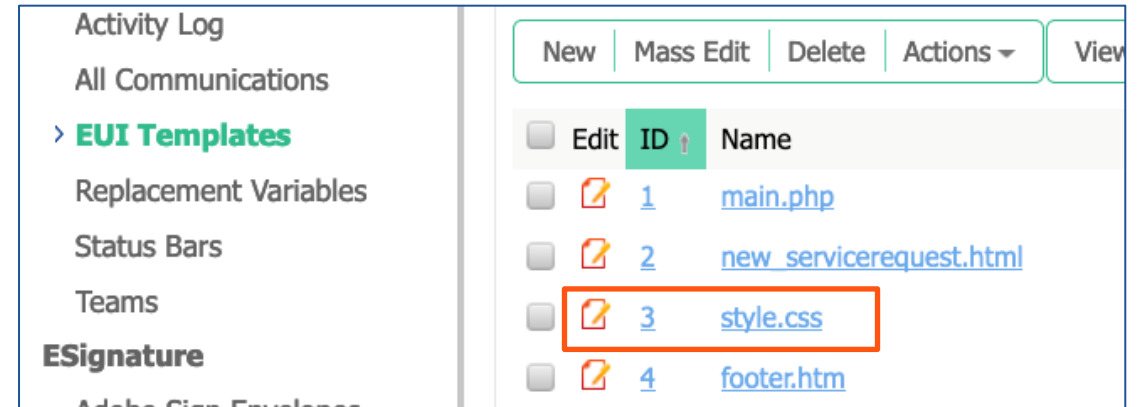
Company Documents

Insurance Coverages

Contract Tasks

End User Interface CSS

- The style of some portions of the end user interface is controlled by the style.css EUI template record. Commonly changed elements include:
 - Background color/image
 - Fonts and font colors
 - Style of menu tabs
 - Style of the search bar
 - Icons



The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a list of menu items: Activity Log, All Communications, > EUI Templates (highlighted in green), Replacement Variables, Status Bars, Teams, ESignature, and Adobe Sign Envelopes. The main content area displays a table with columns for Edit, ID, and Name. The table contains four rows of data, with the third row (ID 3, Name style.css) highlighted with a red box. The table also includes a header row with 'New', 'Mass Edit', 'Delete', 'Actions', and 'View' buttons.

	New	Mass Edit	Delete	Actions	View
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Example EUI Home Page

Language: English | User: **contractuser** | [Logout](#)

[Home](#) [New](#) [View](#) [My Profile](#)

Welcome to the Agiloft Custom Portal

You are on the Custom Portal Homepage. From here you can create new records, View or edit existing records, and depending on your permissions and your companys setup, you may be able to browse frequently asked questions by clicking FAQs and view or update your user account information using My Profile.

Contracts

- [+ Create a Contract Request](#)
- [≡ View My Contracts](#)
- [≡ View All Contracts](#)

Powered by Agiloft

Search: [Go](#)





Graphical Data Elements











Row Coloring

Contracts

Status: Contract #208 successfully updated. 24 record(s) found, 1 page(s) [Click for details....](#)

New | Mass Edit | Delete | Actions ▾

Views ▾ | Search ▾ |  ▾ |  ▾



<input type="checkbox"/> Edit	ID ↓	Contract Title	Company Name	Status	Contract End Date
<input type="checkbox"/> 	209	Subcontract to Master Services Agreement with IBM	IBM	Active	May 01 2019
<input type="checkbox"/> 	208	Master Services Agreement Amendment #3 with IBM	IBM	Active	May 01 2020
<input type="checkbox"/> 	207	Master Services Agreement Amendment #2 with IBM	IBM	Pending Signature	May 01 2020
<input type="checkbox"/> 	206	Master Services Agreement Amendment #1 with IBM	IBM	Pending Approval	May 01 2020
<input type="checkbox"/> 	205	Master Services Agreement with IBM	IBM	Active	May 01 2020
<input type="checkbox"/> 	204	Consulting for IT Deployment project	IBM	Signed	Aug 15 2019
<input type="checkbox"/> 	202	Master Services Agreement with IBM	IBM	Active	May 01 2019
<input type="checkbox"/> 	189	Agiloft NDA	Agiloft	Pending Contract Manager	Sep 01 2029
<input type="checkbox"/> 	188	Amendment to support contract for Acme Fremont	Acme Micro	Canceled	Aug 09 2021
<input type="checkbox"/> 	178	Maintenance subcontract Amendment with Acme Micro for SF office	Acme Micro	Pending Approval	Oct 01 2019











Notification Icons

Contracts

Status: 24 record(s) found, 1 page(s) [Click for details...](#)

New | Mass Edit | Delete | Actions ▾



Views ▾ | Search ▾ |  ▾ |  ▾

<input type="checkbox"/> Edit	ID ↓	Contract Title	Company Name	Status	Contract End Date
<input type="checkbox"/>	  209	Subcontract to Master Services Agreement with IBM			
<input type="checkbox"/>	 208	Master Services Agreement Amendment #3 with IBM			
<input type="checkbox"/>	 207	Master Services Agreement Amendment #2 with IBM			
<input type="checkbox"/>	 206	Master Services Agreement Amendment #1 with IBM			
<input type="checkbox"/>	 205	Master Services Agreement with IBM			
<input type="checkbox"/>	 204	Consulting for IT Deployment project			
<input type="checkbox"/>	  202	Master Services Agreement with IBM			
<input type="checkbox"/>	 189	Agiloft NDA			

Contracts

Status: 24 record(s) found, 1 page(s) [Click for details...](#)

New | Mass Edit | Delete | Actions ▾

Views ▾ | Search ▾ |  ▾ |  ▾






























<input type="checkbox"/> Edit	ID ↓	Contract Title	Company Name	Status	Contract End Date	Diagram
<input type="checkbox"/>	  209	Subcontract to Master Services Agreement with IBM	IBM	Active	May 01 2019	
<input type="checkbox"/>	  208	Master Services Agreement Amendment #3 with IBM	IBM	Active	May 01 2020	
<input type="checkbox"/>	  207	Master Services Agreement Amendment #2 with IBM	IBM	Pending Signature	May 01 2020	
<input type="checkbox"/>	  206	Master Services Agreement Amendment #1 with IBM	IBM	Pending Approval	May 01 2020	
<input type="checkbox"/>	  205	Master Services Agreement with IBM	IBM	Active	May 01 2020	
<input type="checkbox"/>	  204	Consulting for IT Deployment project	IBM	Signed	Aug 15 2019	
<input type="checkbox"/>	  202	Master Services Agreement with IBM	IBM	Active	May 01 2019	
<input type="checkbox"/>	  189	Agiloft NDA	Agiloft	Pending Contract Manager	Sep 01 2029	
<input type="checkbox"/>	  188	Amendment to support contract for Acme Fremont	Acme Micro	Canceled	Aug 09 2021	







Image with Versioning

People

Status: 8 record(s) found, 1 page(s) [Click for details....](#)

New ▾ | Mass Edit | Save Changes | Cancel Changes | Delete | Actions ▾

Views ▾ | Search ▾ |  ▾ |  ▾



<input type="checkbox"/>	Image	Full Name	Primary Team	Group	Email	Direct Phone 
<input type="checkbox"/>		Mia Lazano	Document Creator Team	Internal Customer Document Creator	example31@example.com	555-555-6666
<input type="checkbox"/>		Paula Ling	Document Management Team	Document Manager Internal Customer	example34@example.com	555-678-9312
<input type="checkbox"/>		Rick Peterson	Configuration Management Team	Base ServiceDesk Configuration Manager Document Reviewer...	example6@example.com	555-444-5558
<input type="checkbox"/>		Roxanne Marcin	Change Approver Team	Base ServiceDesk Document Reviewer Approver...	example4@example.com	555-444-5556
<input type="checkbox"/>		Chuck Eisner	Change Management Team	Base ServiceDesk Change Manager Approver...	example3@example.com	555-444-5555






Heat Bar

Contracts: Status is Pending Approval

Status: 5 record(s) found, 1 page(s) [Click for details...](#)

New | Mass Edit | Delete | Actions ▾

Views ▾ | Search ▾ |  ▾ |  ▾

<input type="checkbox"/> Edit	ID ↓	Company Name	Contract Type	Contract End Date	Status	Approval Heatbar
<input type="checkbox"/> 	207	Acme Micro	Customer Service Contract	Oct 31 2020	Pending Approval	<div style="display: flex; justify-content: space-between;"><div style="width: 33%; background-color: #cccccc; text-align: center;">2</div><div style="width: 33%; background-color: #ffff00; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">1</div></div>
<input type="checkbox"/> 	178	Acme Micro	Customer Service Contract	Oct 01 2019	Pending Approval	<div style="display: flex; justify-content: space-between;"><div style="width: 33%; background-color: #cccccc; text-align: center;">1</div><div style="width: 33%; background-color: #ffff00; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">0</div></div>
<input type="checkbox"/> 	145	Acme Micro	Non-Disclosure Agreement	Sep 28 2020	Pending Approval	<div style="display: flex; justify-content: space-between;"><div style="width: 33%; background-color: #ffff00; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">0</div></div>
<input type="checkbox"/> 	36	Novell	Vendor Product Support and...	Jul 28 2020	Pending Approval	<div style="display: flex; justify-content: space-between;"><div style="width: 33%; background-color: #ffff00; text-align: center;">0</div><div style="width: 33%; background-color: #ffff00; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">0</div></div>
<input type="checkbox"/> 	32	Agiloft	Vendor Product Support and...	Dec 02 2020	Pending Approval	<div style="display: flex; justify-content: space-between;"><div style="width: 33%; background-color: #ffff00; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">1</div><div style="width: 33%; background-color: #90ee90; text-align: center;">0</div></div>

Singleton Check

Approval Details

Approval Usage: Conditional 3

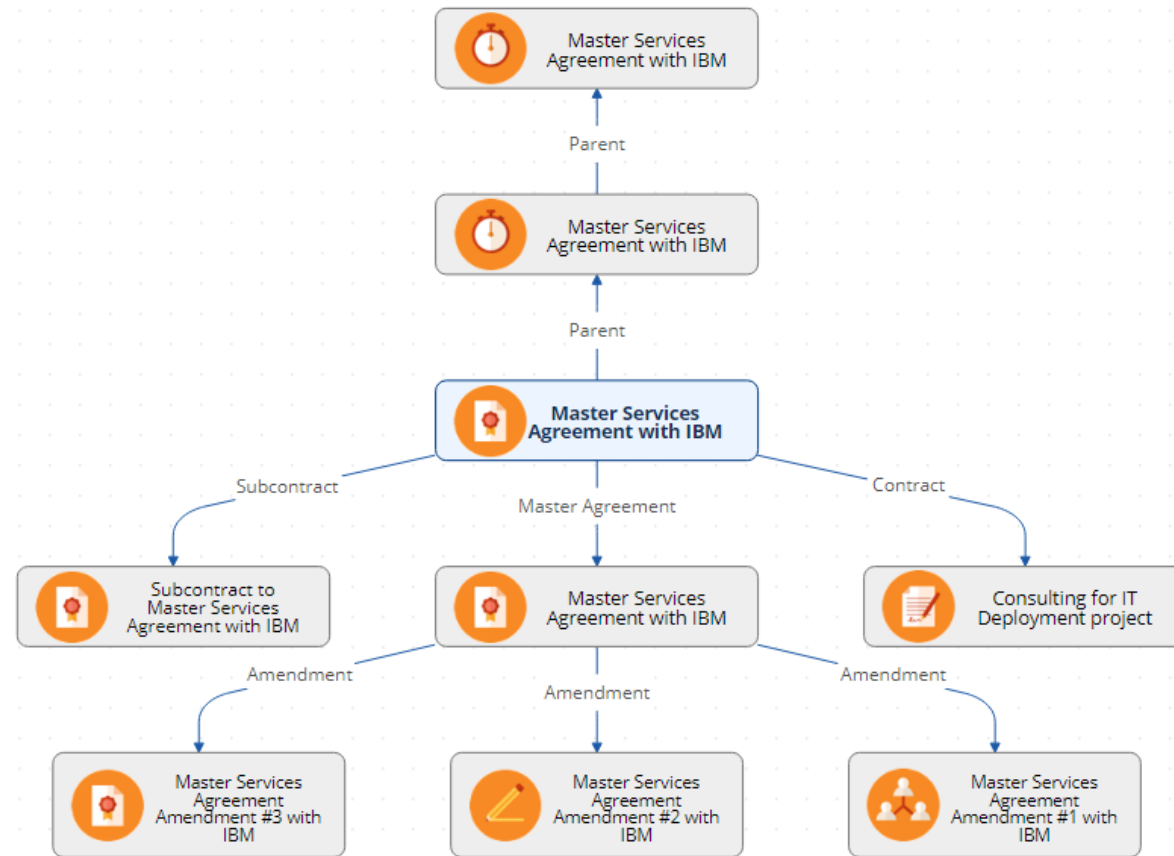
Auto-Approve? Notify for Auto Approval?

Condition: Formula Help

New Save Changes Cancel Changes Delete Increase Step Number by 1 Decrease Step Number by 1 Views

<input type="checkbox"/>	Edit	ID	Step Number	Approval Title	Approval Team	Assign To	Approver	Approval Usage	Auto-Approve?	Notify for Auto Approval?
<input type="checkbox"/>		35	1	Service Responsible Team Notification		Service Responsible Team		Required	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>		36	2	System Administration Team Notification	System Admin Team			Required	<input checked="" type="checkbox"/>	
<input type="checkbox"/>		45	3	IT Executive Board Approval for major changes	IT Executive Board			Conditional		
<input type="checkbox"/>		44	3	CAB Approval for Significant changes	Change Advisory Board			Conditional		
<input type="checkbox"/>		37	3	Change Manager Notification for minor changes		Change Manager		Conditional	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Relationship Diagrams




Data Elements Demonstration



Thank you

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