

# June 2019 Release Webinar

## Question and Answer Session

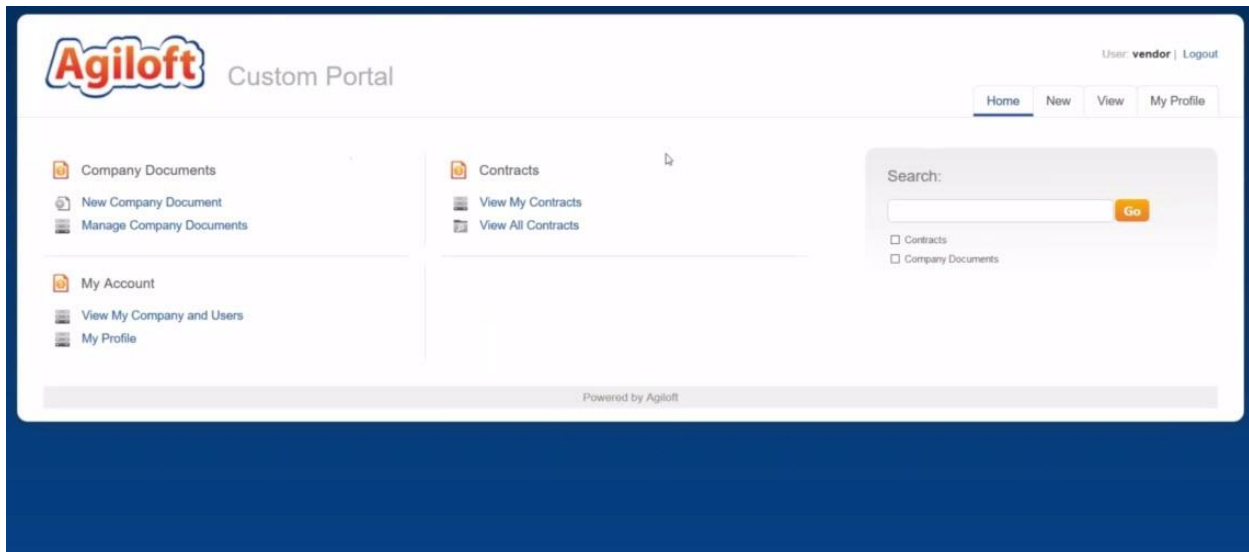
Q: Will the vendor portal require licenses for all vendors?

A: It depends upon exactly what they're doing. For the majority of activity, which can be executed through the simplified vendor portal interface, it's covered under the portal license.

Q: Will there be End User—now Vendor—portal layouts?

A: The Vendor portal is a variation of the End User Interface. You can configure the Vendor layout just as you would the End User layout.

Q: Can you show what the vendor portal looks like?



A: The end user portal is a series of webpages you can set up. You can make them interlinked or separate. We've modified the homepage options for a special vendor group so vendors can access their account. They can view their company and users. They can view their company information, create new users that are related to their company, and then they can upload company documents such as insurance certificates or other files you might need from them. In a support or contract management scenario, you can interweave this with the other pages so users have access to submit tickets, respond to contract requests, or see contracts they're involved in.

Q: What are some future advances to intelligent OCR that we can expect?

A: The intelligent OCR is the first step toward a lot of AI functionality in the system centered around our planned AI Core rollout in Fall 2019. Currently data extraction from PDF files entails looking at these PDFs, pulling out the data into select fields, and then taking action on those fields as desired. We have a client already using this, who's pulling out data from tax forms and applying it to populate other information about its customers. In the future we're going to have intelligent logic capable of reading through contracts, looking for types of clauses or information that might be missing so that you can trigger alerts to, for example, notify legal that they need to take a closer look at a document because there's no indemnity clause in it.

Intelligent OCR is available with the current release and the other AI enhancements will be coming towards the end of this year, to be presented at [Agiloft Summit 2019](#) in Las Vegas in October.

Q: Is the baseball card popover dialog box an option that will be available in the view settings?

A: Yes. The view options have changed so that rather than all of the checkboxes being visible, there's an option called Cell Link where you can specify if you want a particular cell to work for Edit, View, Edit Popover, View Popover, or just plain text. That's where that option can be set in the view itself.

Q: When will this new release be available?

A: It will be available for download in three weeks. Please let your implementer or project manager know if you'd like to get early access for deployment on your own server and we'd be delighted to make it available.

Q: Will the new features be available to all?

A: Yes. We will upgrade our hosted customers automatically. If you're on a dedicated server, talk to your implementer or project manager about when you want KB upgraded. If you're hosted in house on your own server, then updates are up to your admin team. We have two major releases every year. We recommend updating your servers at least once a year.

Q: What is the difference between a 'Pending' and a 'Queued' status?

A: Pending is shorthand for Pending Approval. Queued means a person has not yet been notified that we need them for a particular approval. Pending Approval is what we say when we've sent them an email and notified them and am now waiting on their approval.

Q: Can you talk more about the new concurrent editing feature?

A: With concurrent editing, people on different computers can edit the same Microsoft Word or Excel document simultaneously. Concurrent editing is an option that can be turned on for particular file fields. You have an option in all of the file fields to allow versioning. If you turn on versioning you can specify if you want to allow concurrent editing. You do not have to allow this. If you do allow it, the document opens on your local computer using your local install of Word or Excel. But if you save the document, it's not saved to your hard drive, it's saved back to your Agiloft system in the cloud. It's accessing the file via URL, and concurrent editing leaves that open so that other users in your system, if you've turned on concurrent editing, can open the file to work on it at the same time. At the top of the document you can see users that are also editing the document at the same time. As they make changes, they get saved back into the cloud and reflected back into the version you are working on.

Q: Do we need to purchase licenses for vendors?

A: You do need to purchase licenses for the vendors. We expect the vendors will be End Users, so you will need an [End User license](#). For the most part vendors will use the unlimited End User license and will not be using named Staff licenses, though it depends what vendors are doing. If vendors are significant contributors to the system and they're using the system to generate custom contracts, for example, then you would need a license for each vendor. If vendors are using the End User portal to access contracts which have been created for them by you, the primary stakeholder, then it would be covered under the unlimited End User license.

Q: Is intelligent OCR the Agiloft equivalent of AI contract language?

A: No. AI contract analysis functionality coming in the Fall Release involves training the Agiloft AI Core to recognize specific language in contracts and run analysis on it. OCR data extraction looks at where things are on the document and pulls them out. It works best on static forms where things generally appear in the same place.

Q: Is training available on intelligent OCR functionality?

A: We will provide documentation on intelligent OCR functionality and how to implement it. Our implementation team is undergoing training now. To use it you will provide sample files to the OCR tool and tell it where you want the data pulled from. We will create fields on our side to then hold that data and then send it out to that system. We have a central KB where we send the data that does the OCR analysis.

Q: Can the data be pulled out and added to different tables?

A: Yes. For the demonstration we had everything going through an Intelligent OCR table. We know our customers are using the system in different ways and they have different tables with different names. To simplify the roll out we are using this one launch point for everything. But then once we pull the data back to that Intelligent OCR location, you can push it out to Contracts, Tickets, Agreements, or whatever location you like.

Q: How are hierarchies within the diagrams created?

A: When you set up the diagram field you will give it linked or related fields. Either a linked field or a related table determines the upstream or downstream connection and that's how it's going to map things. From the record you triggered the diagram on, it will look at a related table (in our case for contracts), so it goes down to that related table to see the child records, and from there it follows the same related table to get their child records and so on.

Q: Will the intelligent data extraction work for a company that needs to upload historical agreements?

A: Yes, if you have enough documents to train the system. If the historical agreements you're uploading are all your own internal documents and they're generally the same, then you should be able to pull the data from them. If every contract looks different, then there isn't going to be enough to train the system on where to look for the information.

Q: Are there any plans to make table views more flexible, such as being able to drag to resize columns on the fly?

A: We just did a major overhaul on some of the back-end HTML and how things are presented. That major overhaul was a necessary step in making the user interface a lot more reactive. Now that this has been completed, we are looking into all of the things we can do with it.

Q: For the AI Core feature, can you elaborate on the training of the tool and how we would go about getting that implemented?

A: With the upcoming Fall Release, we will provide pre-trained models that you will then be able to fine tune using your own data. We are also providing a general integration to Amazon SageMaker so that you can build completely custom models using Agiloft data on SageMaker, assuming that you have some level of expertise in AI. And of course, our implementation team is being trained on building such models and will be available to help customers. Lastly, we will provide models through the AWS ecosystem that are already pre-trained on certain capabilities.

Q: Will there be documentation related to these new enhancements?

A: Yes, see [here](#).

Q: Are there plans for a mobile app to accompany the website?

A: We have a mobile interface for both Staff and End Users. Last year overhauled it to improve the user experience. The interface includes all the functionality except for the ability to make admin level changes. Based on permissions, users are given access to information they're normally permitted to see in the desktop interface. To see our mobile interface, navigate to your normal login page on your mobile device, log in, and you will be taken to Agiloft's mobile interface.

Q: With the AI tool, is there a solution for automating obligation extraction or obligation management?

A: This requires reading through contracts and specifically extracting the obligations listed and then storing them in a separate location as well as reporting on them. Data extraction (intelligent OCR) supports this, provided your obligations are presented as a table in the Word document. Oftentimes we fill in the obligations for our customers. When we do that we go ahead and grab the data while we are populating the document. Otherwise, if they are presented in a table in the document, or an obligations section, we should be able to pull that out with intelligent OCR. We'll have to do some data analysis on it once we get it back to process the individual lines.

Q: Will the new functionality be included in the standard license fees?

A: Yes. Updates are always included in the standard license fee. For hosted customers, standard license fees include updates. For customers who are on their own server, as long as you are up to date on the license fees, then all the new updates are included. As a note for people who are hosted in-house and want to update: we will need to reissue licenses. Please coordinate with your sales representative or implementer for that. There are a few steps we want to make sure are done properly so there are no headaches for you along the way.