

Back to the Basics: Agiloft Admin Bootcamp

What aspects of my system rely on groups? What aspects rely on teams?

How could I leverage roles to simplify permissions for my users?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/SD/User+Roles>

<https://wiki.agiloft.com/display/SD/Groups>

<https://wiki.agiloft.com/display/SD/Teams>

Don't Stop Belivin' - The CLM Program Journey

What components of my CLM program do I need to give more attention to?

(Charter, System/Process Diagrams, Contracting, Approval, Signature & Retention Policies, Program Roadmap/5 Year Technology Plan, Change Management and Communications Plan, Program Governance)

Where are we on our CLM Journey and what's our level of CLM maturity?

How many of the critical success factors are we currently meeting?

Q&A Notes:

New and Now: Agiloft AI and Your Future CLM

How can conversational AI improve the efficiency of my contracting process?

How can enhanced AI facilitate my third party negotiation process?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/What%27s+New>

[Click here](#) to contribute to the Conversational AI project!

Level Up with Agiloft's Advanced Admin Training

How could I use mass editing to simplify large tasks in my daily work?

Which fields do I have that could be hidden by visibility conditions, and how could doing so improve my user experience?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/List+of+Data+Types>

<https://wiki.agiloft.com/display/SA/Database+Limits>

<https://wiki.agiloft.com/display/HELP/Visibility+Dependent+Fields>

<https://wiki.agiloft.com/display/HELP/Mass+Editing+Records>

The CLM Journey: Implementing Success at Your Organization

What does an accelerated no-code implementation lifecycle entail and require for success?

What pitfalls should my organization avoid when undertaking the Agiloft CLM Journey?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/Importing+Record+Data>

<https://wiki.agiloft.com/display/HELP/Design+Articles>

Work Where You Want with Agiloft Contract Assistant

How could the Agiloft Contract Assistant applications improve the user experience within my Agiloft system?

How can Agiloft continue to make my work easier after the AI has tagged clauses and metadata?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/Agiloft+Contract+Assistants>

<https://wiki.agiloft.com/display/HELP/Artificial+Intelligence>

<https://wiki.agiloft.com/display/HELP/ATHENA+Label+Sets>

Power Up to Become an Effective Power User

How can saved searches and custom views improve user experience for my power users?

How can I improve my record layout?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/View+Wizard>

<https://wiki.agiloft.com/display/HELP/Navigating+the+Power+User+Interface>

<https://wiki.agiloft.com/display/HELP/Using+the+Navigation+Menu>

Critical Connections: The Power of the Agiloft Integration Hub

What integrations could I implement with the integration hub that would support my business processes?

What are best practices when building recipes?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/What%27s+New#What'sNew-AgiloftIntegrationHubpoweredbyWorkato>

<https://wiki.agiloft.com/display/HELP/Integration+Hub>

Bring Your Data to Life with Dashboards and Reports

How can reports and dashboards enable my users to track and manage contract data more effectively?

What are best practices for Reporting?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/Reporting>

<https://wiki.agiloft.com/display/HELP/Dashboards>

The Juggling Act: How to Manage Multiple Environments

What are the benefits of multiple environments? Is the extra effort to manage worth it?

What characteristics does my business process have that might make my system a good candidate for using sync?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/SA/Installation+Guide>

<https://wiki.agiloft.com/display/SA/Upgrade+Guide>

<https://wiki.agiloft.com/display/SA/Upgrading+In-House+Systems>

<https://wiki.agiloft.com/display/HELP/Pushing+Changes+to+Production>

<https://wiki.agiloft.com/display/SA/Import+in+the+Admin+Console>

<https://wiki.agiloft.com/display/SA/Creating+Backup+Files>

<https://wiki.agiloft.com/display/HELP/Managing+Multiple+Environments#ManagingMultipleEnvironments-RefreshRefreshChecklist>

<https://wiki.agiloft.com/display/HELP/Managing+Multiple+Environments#ManagingMultipleEnvironments-EnvironmentConfigurations>

<https://wiki.agiloft.com/display/SA/Creating+Backup+Files>

<https://wiki.agiloft.com/display/SA/Transferring+Knowledgebases+Across+Servers>

<https://wiki.agiloft.com/display/HELP/Check+Release+Version>

<https://wiki.agiloft.com/display/SA/Installation+Guide#InstallationGuide-ReleaseVersionNumbering>

Covering Your Bases with Obligation and Task Management

What are some ways that tasks can provide a benefit to CLM workflow, above what is offered by Approval workflows?

What is the difference between an obligation and a task? Which one is right for my business case?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/SD/Task+Management>

<https://wiki.agiloft.com/display/SD/Contracts+Table>

<https://wiki.agiloft.com/display/SD/Contract+Types+Table>

<https://wiki.agiloft.com/display/SD/Clause+Types+Table>

<https://wiki.agiloft.com/display/SD/Functions+Table>

Diving into the End User Interface

How can I leverage Agiloft EUI to create different user experiences based on groups?

How does my current look and feel setup reflect my user's practices, and how could I change it to be more reflective of their needs?

Q&A Notes:

Resources:

<https://wiki.agiloft.com/display/HELP/End+User+Interface>

<https://wiki.agiloft.com/display/HELP/End+User+Look+and+Feel>