



DEMO KNOWLEDGEBASE DOCUMENTATION

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CONTENTS

<u>DEMO KNOWLEDGEBASE DOCUMENTATION.....</u>	<u>1</u>
<u>INTRODUCTION.....</u>	<u>8</u>
STAFF AND END USER TERMINOLOGY.....	9
GROUPS AND TEAMS.....	9
GROUPS.....	10
TEAMS.....	11
TABLE STRUCTURE AND TERMINOLOGY.....	12
<u>DEMO KNOWLEDGEBASE TABLES.....</u>	<u>13</u>
<u>COMPANIES TABLE.....</u>	<u>14</u>
Use Case.....	14
Workflow.....	14
Ownership.....	15
<u>PEOPLE TABLE, AND EMPLOYEE AND END USER SUB-TABLES.....</u>	<u>15</u>
Use Case.....	15
Ownership.....	15
Reports.....	16
<u>DEPARTMENTS TABLE.....</u>	<u>16</u>
Use Case.....	16
Workflow.....	16
Ownership.....	16
<u>LOCATIONS TABLE.....</u>	<u>17</u>
Use Case.....	17
Ownership.....	17
<u>SUPPORT OPERATION TABLES.....</u>	<u>18</u>
<u>SUPPORT CASE TABLE.....</u>	<u>18</u>
Use Case.....	18
Ownership.....	20
Automation.....	20
Workflow.....	22
Workflow Automation.....	22
<u>HELPDESK CASE TABLE.....</u>	<u>23</u>
Use Case.....	24

Ownership.....	26
Automation.....	26
Workflow.....	28
Workflow Automation.....	29
Reports.....	29
Saved Searches.....	29
Default Group Permissions.....	30
CHANGE REQUEST TABLE.....	30
Use case.....	30
Ownership.....	32
Automation.....	32
Workflow.....	34
Reports.....	34
Saved Searches.....	34
Default Group Permissions.....	34
ASSET TABLE.....	34
Use Case.....	35
Ownership.....	37
Automation.....	37
Workflow.....	37
Reports.....	38
Default Group Permissions.....	38
MODELS TABLE.....	38
Use case.....	38
Ownership.....	39
Saved Searches.....	40
Default Group Permissions.....	40
SOFTWARE APPS TABLE.....	40
Use case.....	40
Automation.....	42
Ownership.....	42
Default Group Permissions.....	43
REPAIR REQUESTS TABLE.....	43
Use Case.....	43
Automation.....	46
Ownership.....	48
Workflow.....	48
Reports.....	49
Default Group Permissions.....	49
REPAIR ITEMS TABLE.....	49
Use Case.....	50
Automation.....	51
Ownership.....	52
Workflow.....	52
Default Group Permissions.....	53
AGILOFT REQUESTS TABLE.....	53
Use Case.....	54
Automation.....	55
Ownership.....	57
Workflow.....	57

Default Group Permissions.....	57
SALES CRM TABLES.....	58
LEADS TABLE.....	58
Use Case.....	58
Email Marketing.....	59
Automation.....	59
Ownership.....	60
Workflow.....	60
Reports.....	61
Saved Searches.....	61
Default Group Permissions.....	61
OPPORTUNITIES TABLE.....	61
Use Case.....	62
Automation.....	63
Ownership.....	63
Workflow.....	63
Reports.....	63
Saved Searches.....	63
Default Group Permissions.....	64
CAMPAIGN TABLE.....	64
Use Case.....	64
Email Marketing Campaigns.....	65
Ownership.....	66
Workflow.....	66
Reports.....	67
Default Group Permissions.....	67
EMAIL CLICKS.....	67
Automation.....	68
Ownership.....	68
Default Group Permissions.....	68
QUOTES TABLE.....	68
Use Case.....	69
Automation.....	69
Ownership.....	70
Workflow.....	70
Workflow Automation.....	70
Default Group Permissions.....	71
PRODUCTS QUOTED TABLE.....	71
Use Case.....	71
Automation.....	71
Ownership.....	72
Reports.....	72
Default Group Permissions.....	72
PRODUCTS TABLE.....	72
Use Case.....	73
Ownership.....	73
Reports.....	74

Default Group Permissions.....	74
<u>PROJECT MANAGEMENT TABLES.....</u>	74
PROJECT TABLE.....	74
Use Case.....	74
Automation.....	75
Ownership.....	76
Workflow.....	76
Reports.....	76
Saved Searches.....	76
Default Group Permissions.....	76
PURCHASE ORDERS (PO) TABLE.....	76
Use Case.....	76
Ownership.....	77
Workflow.....	77
Default Group Permissions.....	77
TIME ENTRIES TABLE.....	78
Use Case.....	78
Automation.....	79
Ownership.....	79
Reports.....	79
Saved Searches.....	79
Default Group Permissions.....	79
BILLING TABLE.....	79
Use Case.....	80
Ownership.....	81
Default Group Permissions.....	81
<u>CONTRACT/DOCUMENT MANAGEMENT TABLES.....</u>	81
CONTRACTS.....	81
Staff Use Case.....	82
End User Use Case.....	92
Ownership.....	94
Automation.....	94
Workflow.....	98
Reports.....	98
DOCUMENTS TABLE.....	99
Use Case.....	100
Automation.....	101
Ownership.....	102
Workflow.....	103
Reports.....	103
INSURANCE CERTIFICATES TABLE.....	103
Use Case.....	103
Ownership.....	104
APPROVALS TABLE AND APPROVAL TEMPLATES SUBTABLE.....	105
Use Case.....	105

Ownership.....	107
Automation for Approvals.....	107
Automation for Approval Templates.....	109
Workflow.....	110
Reports.....	110
WORKFLOWS TABLE.....	110
Use Case.....	110
Ownership.....	114
STEPS TABLE.....	114
Use Case.....	114
Workflow.....	116
Ownership.....	116
<u>ADDITIONAL TABLES.....</u>	<u>116</u>
SURVEY TABLES.....	116
Survey Table.....	116
Survey Answer Table.....	118
TASKS TABLE.....	119
Use Case.....	120
Automation.....	121
Ownership.....	122
Workflow.....	122
Reports.....	123
Saved Searches.....	123
Default Group Permissions.....	123
TASK TEMPLATES TABLE.....	123
Use Case.....	123
Conversion of Templates to Create Tasks.....	124
Automation.....	124
Ownership.....	125
ALL COMMUNICATIONS TABLE.....	125
Use Case.....	126
Ownership.....	126
ACCOUNTING PERIODS TABLE.....	126
Use Case.....	127
Ownership.....	127
ACTIVITY LOG TABLE.....	127
Use Case.....	127
Ownership.....	128
CALENDAR TABLE.....	128
Use Case.....	128
Ownership.....	129
CHAT LOG TABLE.....	129
Use Case.....	129
Ownership.....	129
EUI TEMPLATES TABLE.....	130
Use Case.....	130

OTHER GLOBAL SETUP.....	130
LICENSES.....	130
ACCESS.....	130
IMPORT/EXPORT.....	130
SYSTEM SETTINGS.....	131
LOCALIZATION.....	131
END USER INTERFACE.....	131
CUSTOM LOOK & FEEL SCHEMES.....	131

INTRODUCTION

The Demo KnowledgeBase (abbreviated KB) includes a large number of prebuilt business functions to make it easy to start quickly 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 that you can choose 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 they will not distract by their presence on the screen. They can be activated at any time from the Setup/Tables screen if you decide to you want to use them after all.

Need an application to manage external-facing customer support operations, internal helpdesk support functions, or both? Check our [Support Operations Tables](#).

Looking for a product to help you with Project Management, purchase orders, hours and billing? Check the [Project Management](#) section.

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

View the [Contracts/Documents Management](#) section to find out more about the pre-built contract and document management functionality in the Demo KB.

Interested in seeing how Agiloft can be used to manage surveys? Check the [Survey Tables](#) section.

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, 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 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** 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 (receiving the superset of those groups' permissions) 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. 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 under the Permissions tab. 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 additive. 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.

Groups	Type	General description of their 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
Contract Creator	End User	For internal employee who can create a contract
Contract Manager	Staff	Internal employee who can create and edit his own contracts and view all contracts
Customer	End user	Basic external end user who may submit support cases and view his own cases
Customer Manager	End user	Customer Manager - these users will be able to view project information related to their 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	People 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 - for managing campaigns and leads
Professional Services	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
Selfregistre	End user	User who self-registered via the "register" guest login

Groups	Type	General description of their access permissions
d User		
Support Manager	Staff	Manager of support teams, has deletion and other privileges
Support Staff	Staff	Will be able to view projects and also perform work on them, but cannot create them

TEAMS

Teams are the main assignment and notification entities. 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 and this determines the look and feel 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 other teams to which they belong. It will be used as the filter for the Assigned inbox, for email notifications, and so on.

If you need to provide a custom look and feel and customer branding to different sets of users, then you will need a separate customer team to go with each “look and feel scheme”. Teams can also be associated with a different default language, so it would make sense to have language-based customer teams if you were planning to run the program in a multi-lingual environment.

Each team can have working hours assigned to it (as well as 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 configured 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
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
Contract Creator Team	Contract end users who can create contract and manage their own contracts
Contract Manager Team	Managers of contract creators
Customer Manager	Customer managers

Teams	Description
Team	
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
Agiloft Implementation Team	Agiloft employees responsible for implementing Agiloft; this team is used when Agiloft is providing implementation services
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
Professional Services Team	Members of this team are assigned to projects
Repair Team	Default team assigned to new repairs
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

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.

Fields are data items, which contain specific information, and are a component 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 general use tables in the Demo KB are Company and Contact. Companies and Contacts are two distinct entities, each with different data items associated with them. These data items are defined as fields in the respective tables. Each company will have its own record in the Company table and likewise, each person will have their own entry in the Contact table. The KB maintains the tables, records, and fields, and the links between them, making it possible to quickly find all contacts in a given company, for example.

Saved Searches are specified uniquely for each table, and help you find specific types of records, or limit your 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, Actions and Rules**.

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 specialized "Workflow State" field. These transitions may run stored Actions, such as sending an email from a saved Email Template, or trigger a Rule which such updates a field automatically.

DEMO KNOWLEDGEBASE TABLES

This documentation describes the use of and configuration of all of the tables included in the 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
- Sales CRM
- Project Management
- Contract/Document Management
- Surveys

The Company, Contact, and Task tables are tables that are needed or used across functions, so they are documented on their own.

Additional Agiloft supporting tables are documented in [Agiloft Supporting Tables](#).

COMPANIES TABLE

Purpose: 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.

The screenshot shows a web-based form for editing a company record. At the top, there are navigation buttons for 'Save' and 'Cancel', and a set of tabs including 'Key Info', 'Contacts', 'Sales Info', 'Account Info', 'Address', 'Emails', and 'History'. The 'Key Info' tab is active. The form fields are as follows:

- ID: 1
- *Status: Active (dropdown)
- *Company Name: Agiloft
- Company Roles: Customer, Prospect, Partner, Manufacturer, Media, Vendor, Other
- *Primary Role: Vendor (dropdown)
- Telephone: 650-587-8615, Ext. 1, Fax: 650-745-1209
- Public Company: Choose one (dropdown), Annual Revenue: \$ (text input)
- Company Website: (text input)
- Ongoing Notes: (text area)
- Background Information section:
 - Account Rep: (text input with search icon)
 - Rep Email: (text input)
 - Created By: (text input)
 - Updated By: EWSYSTEM
 - Primary Team: (text input)
 - Rep Phone: (text input) Ext. (text input)
 - Date Created: (text input)
 - Date Updated: Jul 27 2012 10:46

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.

WORKFLOW

The Company table contains mostly static data, and thus does not have any associated workflow or actions.

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.

PEOPLE TABLE, AND EMPLOYEE AND END USER SUB-TABLES

Purpose: The People table and its two sub-tables are used to store information about individuals, including any associated Company or contact information. The 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 as part of 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 default subtypes of People records: Employees and End-Users. Individuals may be stored in the system as an Employee, an End-User, or a Person that is unassociated with either sub-table.

The End-Users sub-table stores external Contacts who are 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 Employee sub-table holds information about company employees. It stores information like home address and working hours that the End-User 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 their 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

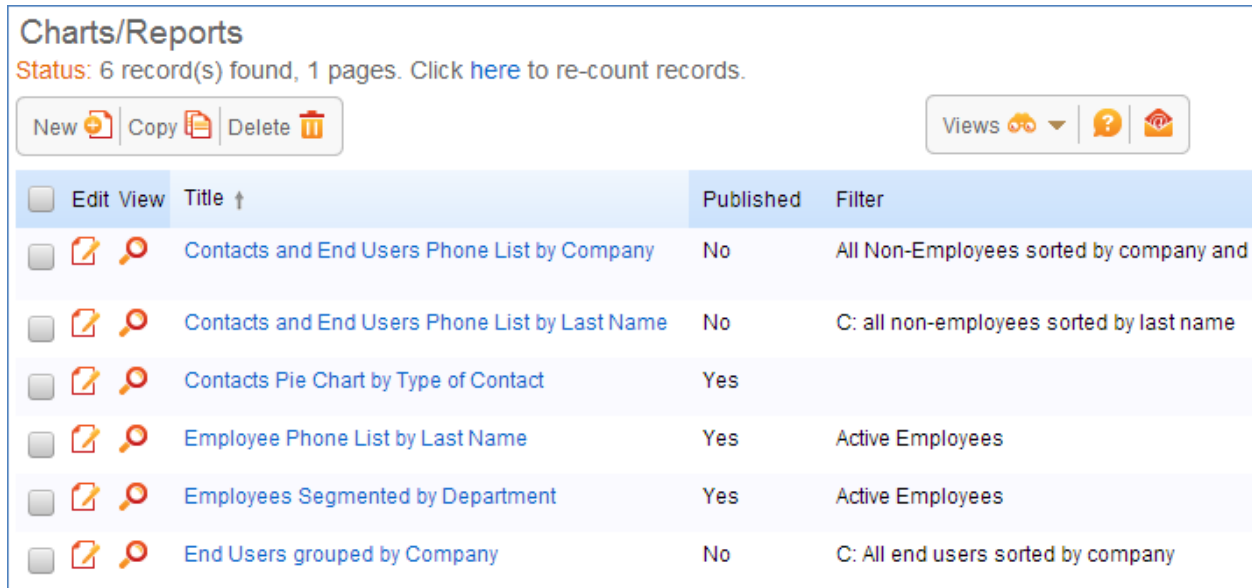
Records in this table are “owned” by an individual.

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. By default, the Contact Owner is the user who created the Contact Record.

Employee and End-User records are “owned” by the user whose Login matches the Login field of the record. Less specifically, each employee or end-user owns his own record.

REPORTS

The People table has the following Charts/Reports set up:



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

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.

WORKFLOW

The Departments table contains mostly static data, and thus does not have any associated workflow or actions.

OWNERSHIP

Records in this table are “owned” by the user whose Login matches that of the Creator Login in each Departments record. Less specifically, Department records are owned by the user who created them.

LOCATIONS TABLE

Purpose: The Locations table is used to store information on multiple locations of a parent Company.

Locations

Save Cancel Location Details Communications << >>

ID 1 Company Name Adobe

Location Name Adobe West Coast

Street Address

Street Address 1	1234 West Main Street	Street Address 2	Suite 35
City	Carlsbad	Zip or Postal Code	95424
Country	USA	US State	CA
Telephone	430-323-8088 Ext.	Fax	434-656-9878

Copy to Billing Address

Billing Address

Billing Address 1	1234 West Main Street	Billing Address 2	Suite 35
Billing City	Carlsbad	Billing Zip or Postal Code	95424
Billing Country	USA	Billing US State	CA

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. A location may have two different addresses. In the event that both the Street and Billing Addresses are identical, the **Copy to Billing Address** button may be used to copy the Street Address to the Billing Address fields.

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.

SUPPORT OPERATION TABLES

SUPPORT CASE TABLE

Purpose: This table is used to manage external customer support requests.

The screenshot shows a 'Support Case' form with the following details:

- Header:** 'Support Case' title, 'Save' and 'Cancel' buttons, and navigation tabs: 'Details', 'Working', 'Related Records', 'Contract', 'Time', 'Emails', 'History'. There are also navigation arrows and utility icons (print, refresh, etc.).
- Case Info:** ID: 82, Status: Closed (dropdown), Assigned Team: (empty dropdown), Assigned Person: Chris Caldwell (dropdown), and an 'Assign to Me' button.
- Contact Information:**
 - *Customer Name: EW Admin (with search icon), User Company: EnterpriseWizard
 - Customer Phone: 555-555-5555, Ext.: (empty), Cell Phone: (empty)
 - *Customer Email: example@example.com, Customer Login: admin
 - Supported User: Yes
- Problem Description:**
 - Type of Issue: Documentation (dropdown), Priority: Low (dropdown)
 - *Summary: How do I add a new table?
 - Problem Description: I would like to divide my support cases into different types and show different fields for each type. Should I add a new sub-table for this?
- Inbound Attachments:** Attach/Manage button, No Files Attached.
- Footer:** 'Save' and 'Cancel' buttons, 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 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 starting 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 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 this will automatically create a Time Entry record associated with the case when he saves his changes. 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. This means each record is associated with a particular customer login and no other customers will be able to edit that record, though members of the Customer Manager group can view all records submitted by other people at their company.

AUTOMATION

Create: New support case actions

Purpose: This handles all notification and time conversion 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
```

I: Update Time Entry

```
if (Time Spent!=NULL) {  
    Convert to Time entry  
    Set Time fields to empty
```

C: Convert to Time Entry

Conversion: Time Entry

Options: Silently with no confirmation

U: Set Time fields to empty

Updated Field: Time Description

Value: Blank

Updated Field: Time Spent

Value: Blank

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 (! 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 Field: Status

Value: Reopened

U: Set State to Updated by Customer

Updated Field: Status

Value: Updated by Customer

Edit: All edit actions done by staff users

Purpose: This handles all notifications and time conversion actions 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 (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 and Status not changed last user's modification)  
    Email customer updated additional notes
```

C: Convert to Time entry

Conversion: Time Entry

Options: Silently with no confirmation

U: Set Time fields to empty

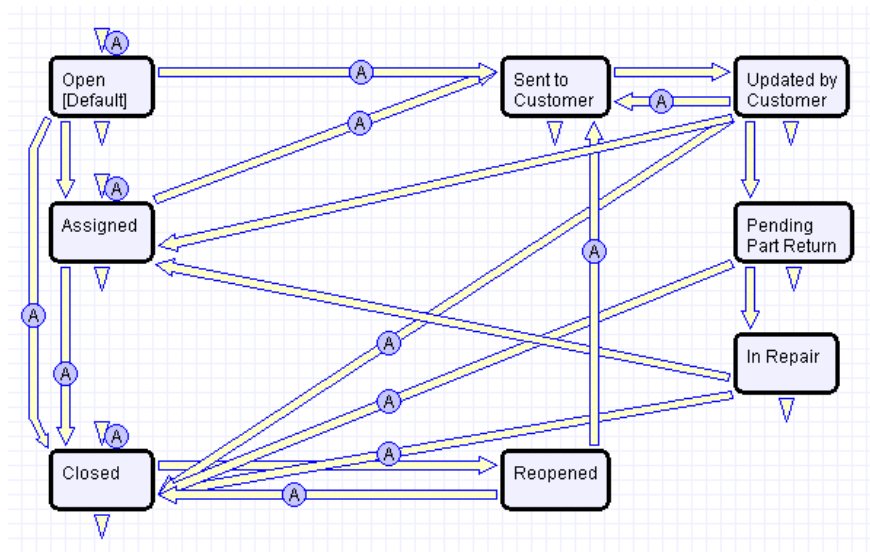
Updated Field: Time Description

Value: Blank

Updated Field: Time Spent

Value: Blank

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.

HELPDESK CASE TABLE

Purpose: This table is used for requests for support from internal users and employees. It differs from the Support Case table in that it does not contain many fields related to the user's company, their support contract, and so on.

Helpdesk Case

Save Cancel Details Working Time Related Records Emails History

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 No Linked to Asset Table

Asset Type Communication Computer Computer Peripheral Data Center Imaging/Printing Video Conferencing

Asset Tag company internet

*Summary

Problem Description

Inbound Attached Files Attach/Manage No Files Attached

Save Cancel

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). Once 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. All user information for the case populates from the user's Contact record. No information regarding Customer Company, SLA, or contract status is applied. When a customer submits a Helpdesk Case the contact information fields automatically populate with details from their user record. If no values are found for the Customer name or

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.

A selection of "Service Request" for Type of Problem and the selection of "New Employee Setup" for Subtype of Problem will cause a field called "New Tasks" to become visible. This field is a link to a single field with multiple values enabled (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 starting 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 this will automatically create a Time Entry record associated with the case when he saves his changes. 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.

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 assignee 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 closed, 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 individual submitter, so each record is associated with a particular user login.

AUTOMATION

Create: All creation actions

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

Runs: When created by web, email or API

Search filter: None

Priority: 2

Actions:

I: All create actions

```
// If the user has entered time spent, a time record is created
if (Time Spent!=NULL) {
    Convert to Time Entry
    Set time fields to blank
}
// 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, time conversion 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 (Time Spent!=NULL) {
    Convert to Time Entry
    Set time fields to blank
}
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

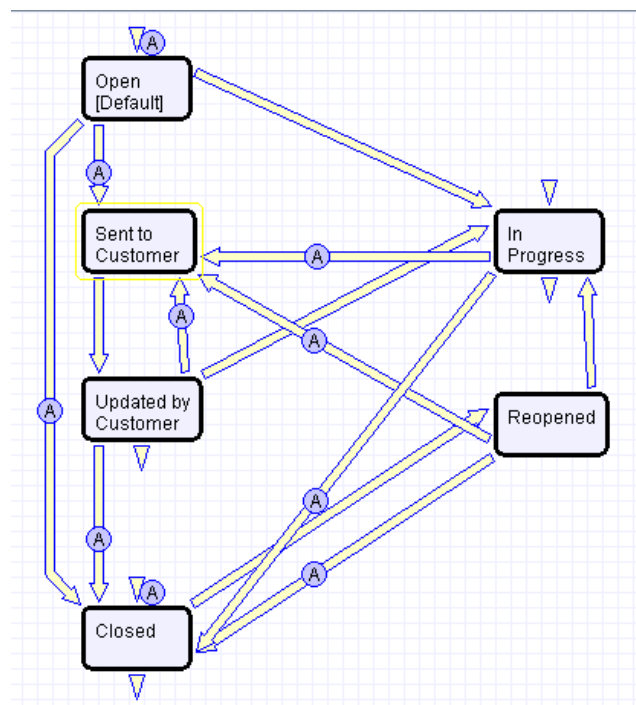
```

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 Software Apps table has the following Charts and Reports set up:

Charts/Reports

Status: 20 record(s) found, 1 pages. Click [here](#) to re-count records.

<input type="checkbox"/> Edit	<input type="checkbox"/> View	Title ↑	Filter	Published	Date Updated	Output Format
<input type="checkbox"/>				Yes	Nov 29 2010 16:30	Graphical chart, HTML
<input type="checkbox"/>				Yes	Jul 05 2010 15:28	Graphical chart, HTML, Excel
<input type="checkbox"/>				Yes	Jul 05 2010 14:53	Graphical chart, HTML, Excel
<input type="checkbox"/>				Yes	Jul 05 2010 14:50	Graphical chart
<input type="checkbox"/>			All Closed Cases	No	Feb 16 2011 17:47	Graphical chart, HTML
<input type="checkbox"/>			C: Date Closed in Past Year	Yes	Jul 02 2013 10:15	Graphical chart, HTML
<input type="checkbox"/>				Yes	Feb 16 2011 17:44	Graphical chart, HTML, Excel
<input type="checkbox"/>			C: Date Closed in Past Year	Yes	Feb 16 2011 17:47	Graphical chart, HTML
<input type="checkbox"/>			Not Closed	Yes	Feb 16 2011 17:43	Graphical chart
<input type="checkbox"/>			My Assigned Support Cases	Yes	Feb 16 2011 17:45	Graphical chart, HTML
<input type="checkbox"/>			All Closed Cases	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel
<input type="checkbox"/>			C: Date Closed in Past Year	No	Apr 17 2012 17:03	Graphical chart, HTML
<input type="checkbox"/>			C: Date Created in past year	Yes	Jul 05 2010 15:40	Graphical chart, HTML
<input type="checkbox"/>				Yes	Mar 23 2012 11:49	Graphical chart, HTML, Excel
<input type="checkbox"/>			Created in past month	Yes	Jul 05 2010 15:53	Graphical chart, HTML, Excel
<input type="checkbox"/>			Not Closed	No	Jan 25 2011 12:52	Graphical chart, HTML
<input type="checkbox"/>			C: Status changed to reopened in last 12 months	No	Feb 16 2011 17:46	Graphical chart, HTML, Excel
<input type="checkbox"/>				Yes	Feb 16 2011 17:33	HTML
<input type="checkbox"/>				Yes	Jul 05 2010 15:57	Graphical chart
<input type="checkbox"/>				Yes	Jul 05 2010 16:00	Graphical chart, HTML, Excel

CHANGE REQUEST TABLE

Purpose: The Change Request table is used for Change Management. A Change request is created when a change is needed to a configuration item 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.

The screenshot shows a web application interface for a 'Change Request'. The form is organized into several sections:

- Header:** 'Change Request' title, 'Save' and 'Cancel' buttons, and navigation tabs: 'Details', 'Approvals and Work', 'Related Records', 'Time', 'Emails', 'History'.
- Form Fields:**
 - ID: 9
 - Urgency: Radio buttons for 'Normal' (selected) and 'Emergency'.
 - Assigned Team: 'Support Team' (dropdown)
 - Assigned Person: (dropdown)
 - Status: 'Approved' (dropdown)
 - Time Spent: 'H' and 'M' input fields.
 - Time Description: (text area)
- Request Information:**
 - *Change Category: 'Problem Ticket' (dropdown)
 - *Risk if Done: 'Low' (dropdown)
 - *Risk if Not Done: 'High' (dropdown)
 - *Related to: 'Helpdesk Case' (dropdown)
- Asset Information:**
 - Asset Name: (text field)
 - Asset Manufacturer: (text field)
 - Asset Type: (dropdown)
 - Asset Subtype: (dropdown)
 - Asset Ownership: (dropdown)
 - Asset Description: (text area)
- Request Details:**
 - Requested Date of Completion: 'May 14 2010 00:00' (calendar icon)
 - Estimated Time to Complete: (text field)
 - *Change Summary: 'Purchase and set up new laptop for user' (text area)
 - Change Description: 'My laptop seems to be broken. I think I need a new one.' (text area)
 - Business Justification: (text area)
 - Backout Plan: (text area)
 - Attached Files: 'Attach/Manage' button, 'No Files Attached' (text)
- Requester Information:**
 - *Requester: 'EW Admin' (user icon)
 - *Requester Email: (text field)
 - *Requester Phone: (text field)
 - *Requester Manager: (text field)
- Footer:** 'Save' and 'Cancel' buttons, and navigation arrows.

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 CR form and provide data for any required fields. Records are creatable in Open and Pending Approval states.

When a technician submits a Change Request, the Requestor contact 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 requestor 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 Requestor 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 Requestor is notified.

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

OWNERSHIP

Records in the Change Request table are “owned” by the linked contact in the Owned By field. This defaults to the person who created the Change Request.

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.

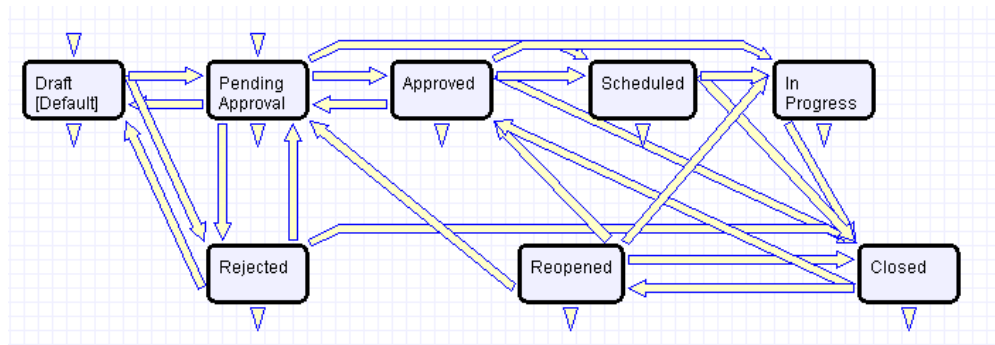
I: Staff edit actions no api


```

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
}

```

WORKFLOW



REPORTS

The Change Requests table has the following Charts/Reports set up:

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 TABLE

Purpose: The Asset table holds records containing information about your company's assets. This may include computers, peripherals, software (including license information), cell phone, smart phones, or any other kind of equipment. 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. If you want to track components of assets that are themselves assemblies, you may need to add additional tables to create a more hierarchical structure or start from our Manufacturer's CRM/Inventory Management template.

Asset

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

Asset Tag

Serial number

Status

*Disposition Shared Asset Assigned to User

Asset Name Dell OptiPlex GX150 MT:12443634e634

ID 28

Asset Details

*Asset Type

Asset Subtype

Model Manufacturer

Vendor

Model Name/Number

Model Description

Data Sheets and Pricing Info

Model Responsible Team

Model Abbreviation

Memory (Gb)

CPU

Operating System

OS Version Detail/Service Pack

Purchase Details

Date Purchased

Purchase Cost

PO Number

Invoice Number

Date Installed

Date Warranty/Support Expires

Service Information

Date of Next Scheduled Service

Date Last Upgraded

Working Notes

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.

Asset

Save Cancel Details Relationships Contracts Requests Emails History

Asset Tag: 12345567 Serial number: 12443634e634

Status: In Stock *Disposition: Shared Asset Assigned to User

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 Unlink

Downstream Assets
Status: No records.
New Unlink Views

Assets may be linked to one or more contracts (while contracts may also be linked to one or more assets). 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 ownership is defined as the user with Full Name matching the Owner Name field in the Asset record.

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

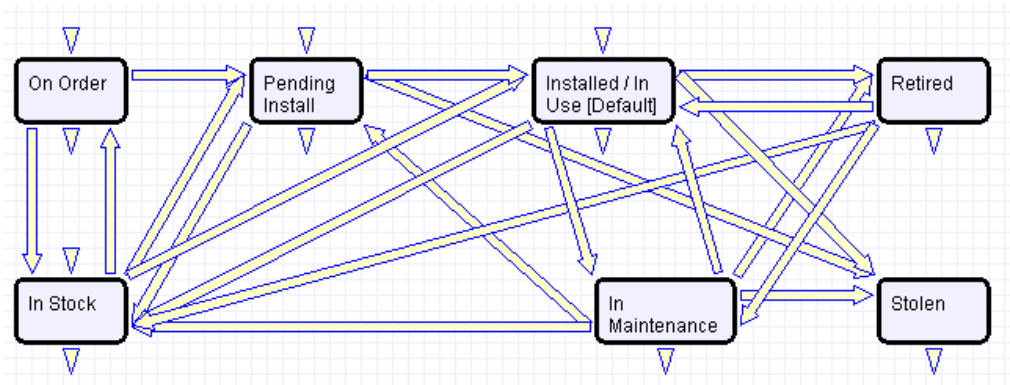
Priority: 2

Notes: This time-based rule is disabled

Actions:

E: Email Responsible Team of scheduled service

WORKFLOW



REPORTS

The Assets Table has the following Charts/Reports set up:

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

Purpose: The Models table was created to ensure consistency in describing assets in the Assets table for purposes of reporting and searching.

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.

Model

Save Cancel Details Assets Communications History

ID 148 *Model Abbreviation 223-4494

*Model Name/Number 223-4494 (Power Edge R200 Quad Core 2.1)

Asset Type Data Center Asset Subtype Server

Manufacturer Dell *Status Active Inactive

Model Description Quad Core 2.13Ghz/1066Mhz FSB/4GB

Data Sheets and Pricing Info **Attach/Manage**
No Files Attached

Latest Unit Price \$ 2,450.00 Date Price Last Updated May 10 2012

Responsible Team Support Team Responsible Team Leader

Save Cancel

A model can be assigned to particular team that would be responsible for any issues for 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 will not access Models at all, as they do not have access to their asset.

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

Models will be owned the individual who creates them.

SOFTWARE APPS TABLE

Purpose: This table is used to hold records for software applications used in assets for purposes of managing licenses, utilization, and upgrades, as well as service contracts.

USE CASE

The Software App table will hold the basic manufacturer, application detail and license information for software 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 'Software App' form with the following fields and controls:

- Header:** 'Software App' title, 'Save' and 'Cancel' buttons, and tabs for 'Details', 'Related Info', and 'History'.
- ID:** 9
- Status:** Radio buttons for 'Active' (selected) and 'Inactive'.
- *Software Title/Version:** Office Professional Plus 2010
- *Manufacturer:** Microsoft (dropdown), **Detail/Service Pack:** 14.0.6112.5000 (64-bit)
- *Type of Application:** Standard Desktop (dropdown)
- Description and Purpose:** Large text area.
- Date of Initial Purchase:** Calendar icon, **Date of Latest Purchase:** Calendar icon
- Responsible Maintenance Team:** Support Team (dropdown), **Responsible Team Leader:** Text field
- Asset Polling name:** Text field
- License Information:**
 - *Type of License:** CAL (Client Access License) (dropdown), **Total Number of Licenses:** 1
 - Number of Licenses Actively Used:** 1, **Calculate** button, **Number of Licenses Available:** Text field
 - Person Responsible for License Purchases:** Text field with magnifying glass icon
- Footer:** 'Save' and 'Cancel' buttons, and navigation arrows.

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 become 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.

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

Total Number of Licenses In this period: Last User's Modification Minute

Did not change
 changed
 changed by more than
 changed from: 0
 0

or Number of Licenses Actively Used In this period: Last User's Modification Minute

Did not change
 changed

Priority: 10

Actions:

U: Update Number of Licenses Available

Updated Field: Number of Licenses Available

Value: \$total_number_of_licenses - \$number_of_licenses_actively_used

OWNERSHIP

Software Apps will be owned the individual who creates them.

REPAIR REQUESTS TABLE

Purpose: This table will be used to manage each request for repair. It can be linked to the support case that generated it and will hold related items called Repair Tasks. 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 EWSYSTEM

*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 “Equipment Problem” is selected as a Support Case Type of 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 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 shipped is not filled in at this time, the next time a staff user edits the request, they 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

Repair Requests, by default, 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 will run to update the status of the Support Case 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 Task for the Repair Team. A separate Repair Task is required for each part to be repaired.

When the number of Completed Repair Tasks is equal to the number of Repair Tasks, 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 will be required to be set. If the Resolution Type is Parts Repaired or 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 will be required to 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.

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

	Updater Team	contains	Value	Customer	<input checked="" type="checkbox"/>	now	
or	Customer Login	equals, =	Variable	\$updater_login	<input checked="" type="checkbox"/>	now	
and	Assigned To	does not equal, !=	Variable	\$customer_name	<input checked="" type="checkbox"/>	now	
and	Assigned To	is not contained in, !<<	Variable	\$GLOBAL.my_teams	<input checked="" type="checkbox"/>	now	

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:

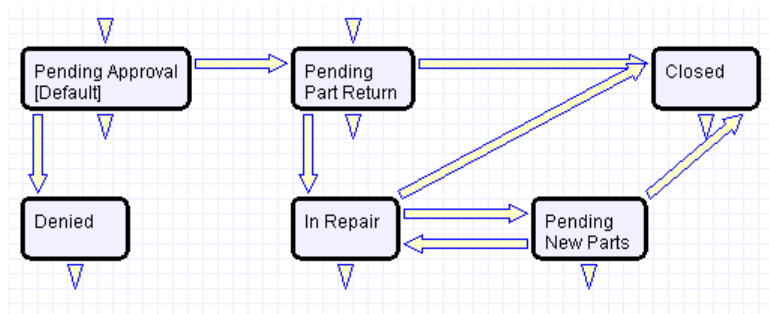
I: All validation actions

```
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  
    }  
}
```

OWNERSHIP

Repair requests will be owned by the customer company on whose behalf they are submitted.

WORKFLOW



REPORTS

The Repair Requests table has the following Charts/Reports set up:

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

Purpose: This table will be used to manage each repair item that is part of a repair request. It will identify the part that is being repaired and have status, assignee, and other information for tracking the repair result.

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

USE CASE

Record Creation

Repair Items will be created by staff members when parts are received by clicking an Action Button that will run 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 generate, automatically, multiple tasks for specific selected sub components of an assembly. Repair Items will be created in the default state of Received/In Progress. Repair Items, by default, 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 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 will run 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 to the Assigned To 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 will be required to be set. The disposition type will be filtered based on the Repair Type. This will initiate a rule to update the parent Repair Request Number of Completed items. 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 Task, 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.

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!='$_1888_full_name' and Assigned To!='$updater_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

Filter configuration interface showing two conditions:

- Condition 1: Status equals, = Pending New Part
- Condition 2: Parts Follow-Up Date is less than or equals, <= this Day

Priority: 1

Notes: This time-based rule is disabled. If used, this rule will need to be rescheduled to run daily.

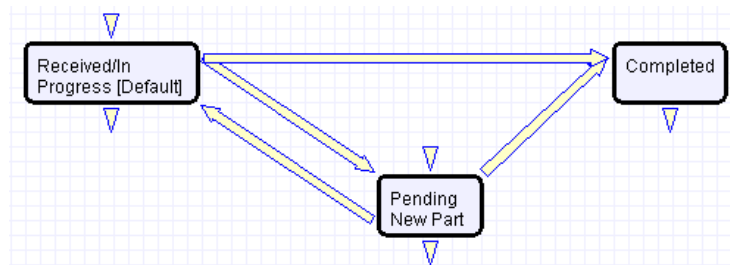
Actions:

E: Notify Assigned To Follow-Up on New Parts

OWNERSHIP

Repair tasks will be owned the individual who creates them

WORKFLOW



AGILOFT REQUESTS TABLE

Purpose: This table is available for use in tracking implementation tasks and configuration change requests. 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 such changes are made to a production system.

This table is deactivated by default, but can be turned on by going to Setup/Tables, selecting it and choosing the Activate button. 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/Groups, and edit the group. Select the Agiloft Requests table, set the option to Show table on a Toolbar Tab to Yes and then give access as needed to create, view, and edit records, and to specific fields in the table.

The screenshot shows the 'Agiloft Request' form. At the top, there is a title 'Agiloft Request' with a gear icon and a copy icon. Below the title are buttons for 'Save', 'Cancel', and tabs for 'Details', 'Emails', and 'History'. There are also icons for printing, refreshing, and deleting. The form contains the following fields and sections:

- ID:** 1
- *Type of Request:** Question about functionality (dropdown)
- Assigned To:** Agiloft Implementation Team (dropdown)
- Status:** Assigned (dropdown)
- Priority:** Medium (dropdown)
- Admin Only:** No (dropdown)
- List the type of record this request is about:** Support Cases (text input)
- *Table Name:** Support Cases (text input)
- *Summary:** how do we do something (text input)
- *Details/Steps to Reproduce:** Here are the steps. (text area)
- Attached Files:** Attach/Manage button, No Files Attached (text input)
- Answers/Notes:** (text area)
- *Email Behavior:** Send automatic emails (dropdown)
- Submitter Information:**
 - Submitter Name: EWSystem (with profile icon)
 - Submitter Team: Admin Team
 - Submitter Email: (empty)
 - Submitter Phone: 415-232-4444
- Additional CCs:** (with profile icon)

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

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 email.

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.

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 edit 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

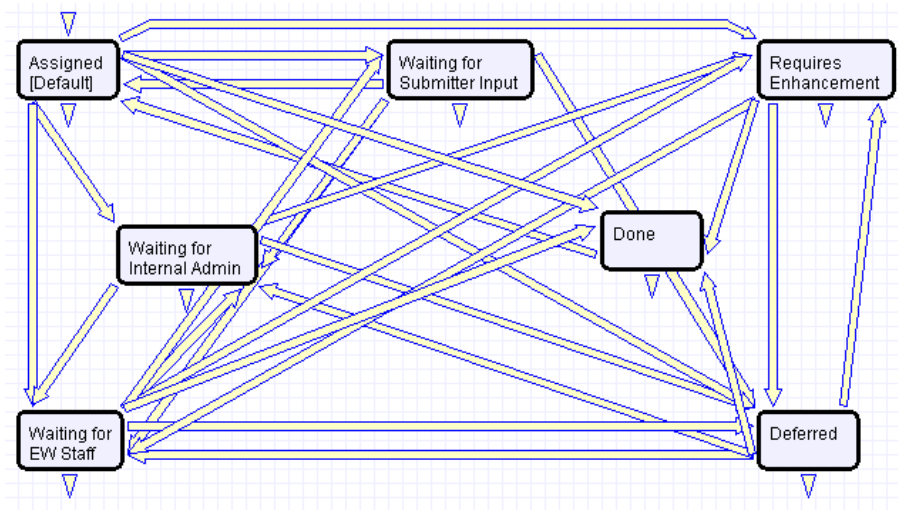
Value: Send automatic emails

OWNERSHIP

Records in this table are “owned” by the person that created them.

Initially, this table is for those responsible for implementation development and testing in Agiloft and the customer company. Users must be in the Agiloft Implementation Team or in the Internal Implementation Team to have access to this table. Because these users need to be able to modify the system, they are in the Admin group, and as such, have access to the entire system and its set-up.

WORKFLOW



DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Agiloft Requests Table: Default Group Permissions](#) in Appendix A.

SALES CRM TABLES

LEADS TABLE

Purpose: This 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. 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 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 the lead to a company, opportunity and contact

ID 17 Status **Converted**

Assigned Team Sales Team Sales Rep Jack Richards

Contact Information

First Name Margery Last Name Woodson

Title VP of Development Email margery@example.com

Direct Phone 123-033-4444 Ext. Cell Phone

Email Opt Out Do not email me

Company Information

*Company AT&T Parent Company

Company Telephone 1-888-944-0447 Company Fax 333111111

Address 1 32 Avenue of the Americas Address 2

City New York US State NY

Postal Code 10013-2412 Intl State or Province

Country USA

Company Website

Region Western US Industry Computer Hardware

Map it Find local hotels

Campaign Name Trade Show

Save Cancel

USE CASE

Record Creation

Leads can be created directly using the web form, or, once an inbound email address is set up for the Leads table, via email. New leads may only 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.

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 changes to Converted, Agiloft converts the information in the record into three new records in the three other tables: Company, Opportunity, and

Contact. This order of creation is important because both the Opportunity and Contact records will contain links to the original Company via the new record. If the Company record is not created first, the Contact and Opportunity records will be unlinked and orphaned, disabling reporting features.

Data fields containing information relevant to the company, such as address and billing address, 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 Contact 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.

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	<input checked="" type="checkbox"/>	now	<input type="button" value="X"/>
and	Campaign Name	equals, =	Variable	\$NULL	<input checked="" type="checkbox"/>	now	<input type="button" value="X"/>
and	Lead Created Via	equals, =	Value	Self-registration	<input checked="" type="checkbox"/>	now	<input type="button" value="X"/>

Priority: 2

Actions:

U: Update Campaign from How did you hear

Updated Field: Campaign Name

Value: \$lead_source

Create: Assign leads round robin to sales team members

Purpose: This handles the assignment of a Leads to Sales Team members.

Runs: When created by web, email or API

Search filter: None

Priority: 3

Actions:

U: Set Sales Rep to member of sales team

Updated Field: Sales Rep

Value: Round Robin Assignment to Members of the Sales Team

Edit: lead conversion

Purpose: This handles the interactive conversion of a Lead record into an Opportunity, Company and Contact record.

Runs: When edited by web

Search filter: Just Converted (Status changed from any value to Qualified)

Priority: 3

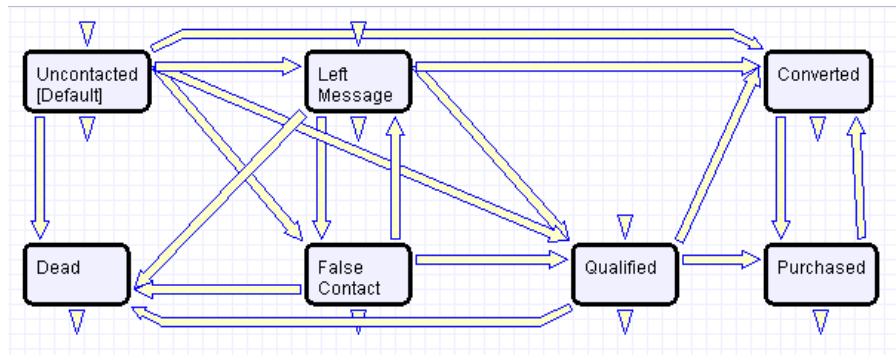
Actions:

C: CONVERT to Company, Opportunity, Contact

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.

WORKFLOW






REPORTS





















The Leads table has the following Charts and Reports set up.

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, an Opportunity, Company and Contact record are created by changing the status of a qualified Lead to Converted.

The screenshot displays a CRM 'Opportunity' record for 'Apple IT upgrade'. The form is organized into several sections:

- Header:** Includes 'Save' and 'Cancel' buttons, and navigation tabs for 'Deal Info', 'Related Records', 'Account Info', and 'History'.
- Basic Information:** Fields for ID (119), Opportunity Name (Apple IT upgrade), Company (Apple), Sales Rep (Jane Salesgirl), Main Contact, and Status (Qualified).
- Opportunity Information:** Fields for Rating (Hot), Sale Value (\$75,000), Estimated Close Date (Aug 01 2012), Products of Interest (EnterpriseWizard License for Linux), Probability of sale (40%), and Attached Contract or PO (No Files Attached).
- Action Information:** Fields for Actions Taken (Confirmed available budget), Next Action (Schedule Presentation or site visit), and Next Action Due (Jul 04 2012 09:00).
- Sales Notes:** A text area containing a note: '[EW System Feb 01 2011 15:30] contact them to arrange a custom sales demo'.

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 or not you are using the Quotes table as your main source of financial value for a sale or the Opportunity table.

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.

The Opportunity has native fields for Estimated Value of Sale, Probability of Sale, and Estimated Close date that 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 a Conversion rule. 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.

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

Notes: This time-based rule is disabled. If enabled, the schedule will need to be adjusted accordingly.

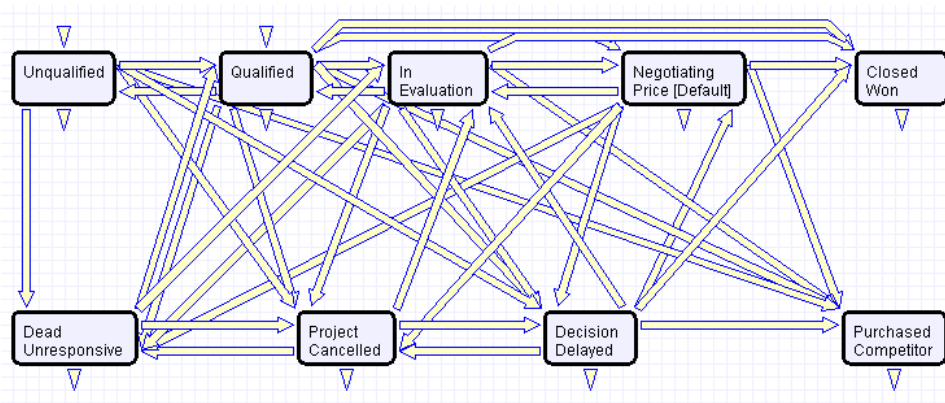
Actions:

E: Email Sales Rep of Upcoming Action

OWNERSHIP

Records in this table are “owned” by the individual assigned sales rep, so each record is associated with a particular user login from the Contacts table.

WORKFLOW






REPORTS

The Opportunities table has the following Charts and Reports set up:

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

CAMPAIGN 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 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.

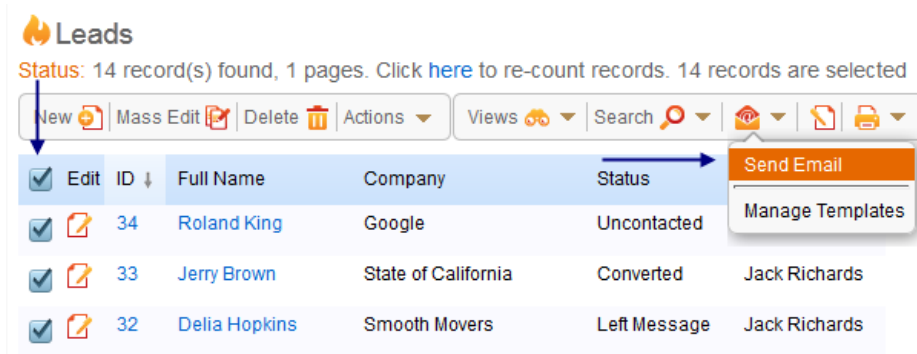
Processing of Records

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.

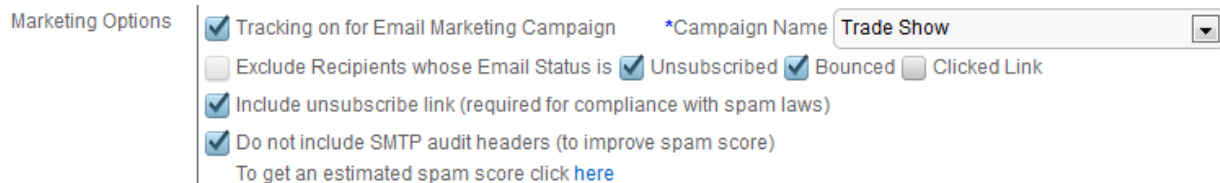
EMAIL MARKETING CAMPAIGNS

Email marketing tracking has been set up by default on the Leads and Contacts tables. This works in conjunction with the campaign table, which contains many statistical fields to track the results of an email blast related to that campaign.

The way this works is that a marketing person sets up a campaign to track results for a particular email blast. An email template that will be sent out may be created on the Leads and/or the Contacts tables. Once the email template is created, a search may be run on the Leads or Contacts table to find the people to whom it will be sent. Once they are selected, the sender mouses over the email icon and clicks Send Email:



He then finds the template that was just created and “imports” it, which brings it up on the screen. Here he chooses the campaign with which the email should be tracked:



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:

Campaign

Save Cancel Campaign Info Results **Email Results** History << >>

ID 1 Type of Campaign **Email marketing** Status **Launched**

*Campaign Name Webinar

Number of Sent Emails	<input type="text" value="5"/>	Recalculate Total and Percentages	
Number of Recipients who Clicked links	<input type="text" value="3"/>	Percent Clicked	<input type="text" value="60"/> %
Number Opened or Clicked but not Unsubscribed	<input type="text" value="3"/>	Percent Opened or Clicked	<input type="text" value="60"/> %
Number Opened but not Unsubscribed or Link clicked	<input type="text" value="0"/>	Percent Opened but not clicked or unsubscribed	<input type="text" value="0"/> %
Number of Opened, Clicked, or Unsubscribed Emails	<input type="text" value="4"/>	Percent Opened, Clicked, or Unsubscribed	<input type="text" value="80"/> %
Number of Unsubscribes	<input type="text" value="2"/>	Percent Unsubscribed	<input type="text" value="40"/> %
Number of Bounced Emails	<input type="text" value="0"/>	Percent Bounced	<input type="text" value="0"/> %

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.

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			

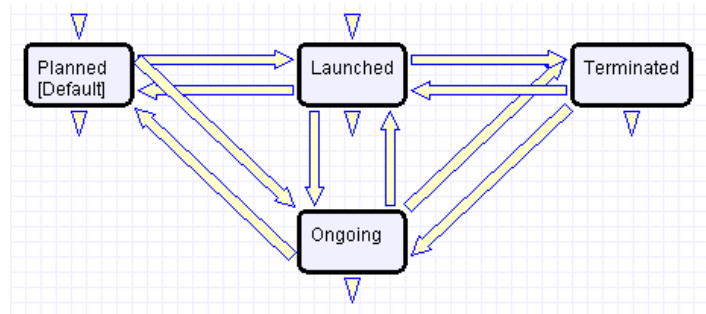
Total Number of Clicks **Calculate**

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.enterprisewizard.com/documentation/email-marketing.pdf> . This kind of functionality can easily be turned on for additional custom tables other than Leads and Contacts.

OWNERSHIP

Records in this table are “owned” by the person that created them.

WORKFLOW



REPORTS

Reports are shown in detail in [Campaign Table: Reports](#) in Appendix A.

EMAIL CLICKS

Purpose: 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 you selected Marketing as one of the functions you wanted 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 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](#) << >>

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
```

OWNERSHIP

Records in this table are “owned” by the person that created them.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Email Clicks Table: Default Group Permissions](#) in Appendix A.

QUOTES TABLE

Purpose: The Quotes table is used to create purchase quotes for prospects or existing customers. It can be used within the Opportunities table or independently. If you use Quotes as your primary way of indicating potential sales value, there are 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 in the Opportunities table instead and track the value of potential sales in the fields in the Opportunity, such as Estimated Value of Sale, Probability of Sale, and Expected Close Date.

Quote

Save Cancel Sales Info **Quote** Emails History << >>

ID: 32 Quote Prepared By: Jack Richards

Quote Number: 1345-2 Quote Expires On: Aug 16 2012

Expected Order Date: Aug 12 2012 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 Taxable Subtotal: \$599.00 **Calculate**

Tax Rate: 0%

Additional Discount Given: Yes No **Calculate Totals**

Discounted Total Before Taxes: \$1,549.00 Sales Tax: \$0.00

Attached Quote PDF: **Attach/Manage** 1. 32_1345-2_IBM.pdf

Total with Tax and Discounts: \$1,549.00

Save Cancel << >>

USE CASE

Record Creation

A quote is created in a default status of Prepared. Upon saving the record, a rule will run to update the Sales Tax, the Discounted Total Before Taxes and Total with Tax and Discounts. Additionally the quote will be attached as a PDF to the record through an Attachment action. If the new quote is saved in a status of Sent to Customer, the quote is emailed to the prospect.

Processing of Records

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

AUTOMATION

Create: New Quote Actions

Purpose: This handles calculations of totals on the creation of a new quote.

Runs: When created by web, email or API

Search filter: None

Priority: 1

Actions:

U: Calculate Total

Updated Field: Sales Tax

Value: $\text{\$taxable_subtotal} * \text{\$tax_rate}/100$

Updated Field: Discounted Total Before Taxes

Value: $\text{\$total_quoted} * (1 - (\text{\$additional_discount_percentage}/100))$

Updated Field: Total with Tax and Discounts

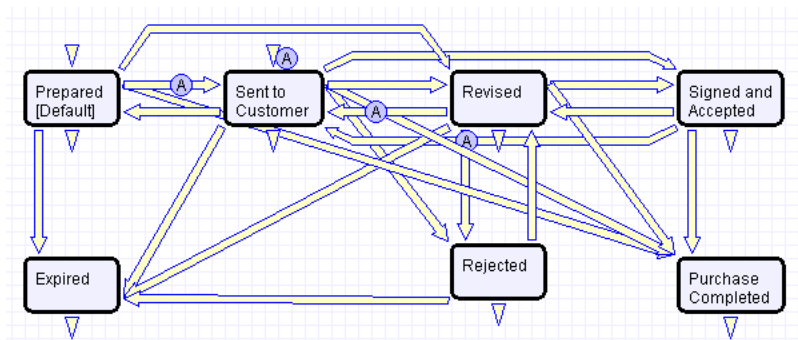
Value: $\text{\$total_quoted} * (1 - (\text{\$additional_discount_percentage}/100)) + (\text{\$taxable_subtotal} * \text{\$tax_rate}/100)$

OWNERSHIP

Quotes are owned by the sales rep who prepares them.

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

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Campaign Table: Default Group Permissions](#) in Appendix A.

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 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
Calculate Total 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 and saved, the total price for the quantity of the item is updated by a calculation based on the Unit Price, Number of Units and the Discount Percentage. When the quantity of an item in a quote is changed, a rule will update the Total Price of the quoted product. The total price can also be updated by an Action Button from the Products Quoted form.

AUTOMATION

Create: Calculate Total Price

Purpose: This handles calculations of totals on the creation of a product quoted.

Runs: When created by web, email or API

Search filter: None

Priority: 2

Actions:

U: [Calculate Total Price](#)

Updated Field: Total Price

Value: $\$unit_price * \$number_quoted * (1 - (\$discount_percentage/100))$

Edit: [Update Total Price when quantity changes](#)

Purpose: This handles calculations of totals whenever an Item Name or Number of Units changes for a Quoted Product.

Runs: When created by web, email or API

Search filter: R: Numbers changed

Priority: 1

Actions:

U: [Calculate Total Price](#)

Updated Field: Total Price

Value: $\$unit_price * \$number_quoted * (1 - (\$discount_percentage/100))$

OWNERSHIP

Records in this table are “owned” by the person that created the associated Quote.

REPORTS

Reports are shown in detail in [Products Quoted Table: Reports](#) in Appendix A.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Products Quoted Table: Default Group Permissions](#) in Appendix A.

PRODUCTS TABLE

The Products table holds products that your company sells and the product values are pulled into Opportunities, Products Quoted (and from there into Quotes), and in Contracts.

Product

Save Cancel Details Orders Emails History << >>

ID 4

Status Active Inactive *Product Type Part Software Service

Product Number msbolt33-124

*Product Name Micro-seal bolt 33mm

Description A bolt used in small components of towers.

Type of Unit Quantity Unit Value Choose one

Price per Unit \$ 2.00 Taxable Yes No

Background

Date Created Apr 06 2010 11:54 Created By EW Admin

Date Updated Mar 17 2012 09:43 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 person that created them.

REPORTS

Reports are shown in detail in [Products Table: Reports](#) in Appendix A.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Products Table: Default Group Permissions](#) in Appendix A.

PROJECT MANAGEMENT TABLES

PROJECT TABLE

Purpose: This table holds records for project management activities. It is currently optimized for companies providing consulting services to their clients, and allows them to manage their billable and unbillable hours, work authorizations, and overall project status.

The screenshot displays a web form for creating or editing a project record. The form is titled "Project" and includes a navigation bar with tabs for "Project Details", "Contact Information", "Billing Information", "Emails", and "History". The "Project Details" tab is active. The form contains the following fields and controls:

- *Project Name:** Text input field containing "Vet system".
- *Project Description:** Text area containing "Implementation in progress".
- *Type of Project:** Dropdown menu set to "New Implementation".
- Status:** Dropdown menu set to "Pending".
- Contract Approved by Customer:** Radio buttons for "Yes" (selected) and "No".
- Date Contract Approved:** Date picker field.
- Next Milestone Date:** Date picker field.
- Target Completion Date:** Date picker field.
- Estimated Hours:** Text input field.
- Attached Contract:** Button labeled "Attach/Manage" and a status indicator "No Files Attached".
- Background:** A light gray horizontal bar.
- Date Created:** Text field showing "Jan 07 2010 08:53".
- Created By:** Text field showing "EW Admin".
- Date Updated:** Text field showing "Mar 07 2012 13:05".
- Updated By:** Text field showing "System".

At the bottom of the form, there are "Save" and "Cancel" buttons, along with navigation arrows.

USE CASE

Members of the Admin or Professional Services groups may manually create Project records. Projects are creatable only in the "Work in Progress" and "Pending" states.

Only members of the Professional Services and Admin Groups may edit Project records, but Support Staff may view their own Project records.

When a record is created with a second assignee, the system will email the assignee if they are not the record's original creator to let them know that a new project has been assigned to them.

A time-based rule will track the total hours related to a project, and compare them to the total authorized hours. When the total hours exceeds the authorized hours, the Project's workflow status is set to "Pending" and the system notifies the project manager of the overrun. Although disabled by default, this rule can be turned on

when using the Project table by using the radio button on the first screen of the rule.

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: If developer != creator

```
if (Developer Name!=NULL and Developer Name!='$created_by') {  
    Email Developer new project assignment  
}
```

TB: Total Hours Spent > Authorized Hours

Purpose: This handles status updates and notifications for Projects where the total number of hours spent is greater than the authorized hours.

Runs: At selected intervals, every ten years at 12 AM

Search filter: Active Projects that have exceeded Authorized Hours

	▼	Status	▼	does not equal, !=	▼	Value	▼	Pending	▼	now	▼	🗑️
and	▼	Total Hours Spent	▼	is more than, >	▼	Variable	▼	\$total_number_of_ho	🔴	now	▼	🗑️

Priority: 1

Notes: This time-based rule is disabled. If enabled, the schedule will need to be adjusted accordingly.

Actions:

U: Set Status to Pending

E: Email PM project has exceeded hours

OWNERSHIP

Records in this table are “owned” by the Employee designated as the Internal Project Manager.

Purchase Order

Save Cancel PO Details Emails History

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

Work Description: Design a system to track client animal care, immunization and hospitalization records.

Attached File: Attach/Manage No Files Attached

Hours: 10 Rate: \$ 200

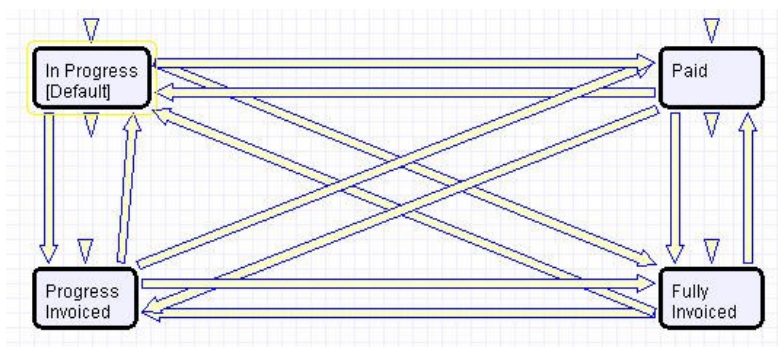
Calculate Value: Calculate Value Total Value: \$ 2,000

Save Cancel

OWNERSHIP

Records in this table are “owned” by an Employee, generally the one who created the record. Each record is associated with a particular Employee login.

WORKFLOW



Default workflow for the Purchase Orders table

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Purchase Orders Table: Default Group Permissions](#) in Appendix A.

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 allowed to create time entries from any other

table. It is related to the Support Case, Helpdesk Case, Change Request, Project, and Task tables by default.

The screenshot shows a 'Time Entry' form with the following details:

- ID: 37
- Related To: Change Request
- *Time Spent: 1 H 34 M
- Hours Spent: 1.57
- Done On: Feb 21 2011
- Done By: EWSYSTEM
- *Work Description: Did some investigation and found source of the problem
- Type of Billing: Time and Materials
- Invoiced: No
- Invoiced On: (empty)
- Background: (empty)
- Date Created: Feb 21 2011 14:40
- Created By: EWSYSTEM
- Date Updated: Feb 21 2011 14:40
- Updated By: EWSYSTEM

USE CASE

Time entry records are used to track employee labor for billing or accounting reporting. Time entries are generally linked to Projects, Support Cases, or Helpdesk cases, but can be integrated in any table where a way of tracking employee time is useful.

Records can only be created by members of the Admin, Support Staff or Professional Services groups. This can be done directly in the time entry table or from fields added to other tables in which time can be recorded, with rule automation added to automatically convert the entry into a separate time entry record. The automatic conversion from simple fields is added to the Support Case, Helpdesk Case, and Change Request tables.

Admins and members of the Sales and Professional Services groups can view and edit their own time entries. Support Staff may view, but not edit, all time entry records. No other groups have access to the table by default.

When a Time Entry is created and the "Related To" field is empty, the system will update this field based on which related Change Request, Helpdesk Case, Project, Support Case or Task ID field is not empty. If a related table is not present, the system will relate the entry to Employee Time.

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: None

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 Name!=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
```

OWNERSHIP

Records in this table are “owned” by the individual in the Done By field, so each record is associated with a particular user login.

REPORTS

Fields are shown in detail in [Time Entries Table: Reports](#) in Appendix A.

SAVED SEARCHES

Saved Searches are shown in detail in [Time Entries Table: Saved Searches](#) in Appendix A.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Time Entries Table: Default Group Permissions](#) in the Appendix A.

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.

USE CASE

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.

The Billing table that is 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 time field when the billing record is created. If you need this functionality, then you may want to use the billable time field and the billing table, but you must train users to be sure they understand how to use it correctly.

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, Professional Services 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.

OWNERSHIP

Records in this table are “owned” by the person that created them.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Billing Table: Default Group Permissions](#) in Appendix A.

CONTRACT/DOCUMENT MANAGEMENT TABLES

The Contract Management and Document Management systems are designed to be ready out of the box 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 document describes how the default contract management and default document management systems are configured.

The Contract/Document Management system is comprised of a few main tables with background tables playing a supporting role. The main tables are described below.

CONTRACTS TABLE

Purpose: The Contracts table holds all contract records. It also controls all associated automation and notifications related to contracts. A representative record can be seen below.

Contract

Save Cancel

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

*Record Type: Amendment

Assigned Team: Contract Manager Team

Status: Draft

Contract Party Type: Customer

Workflow Title: Contract Mgr and Legal parallel approvals

*Parent Contract ID: 143 ID 163

*Internal Contract Owner: Jared Smith

Renewal Type: Notify staff to renew

*Contract Type: Subscription Service

Approval Type: Parallel

Submit for Approval
Cancel Contract

Requester Information

Requester Name: Cathy Dupont Requester Phone: 408-965-9333 Ext. 412

Requester Email: c.dupont@apple.com

For Department: Customer Support Department Head:

Contract Information

*Contract Title: Hosted service subscription for one year

*Contract Description: For 20 users of our SAAS service. Price increase of \$2000 over last contract.

*Contract Start Date: Aug 01 2013 *Contract End Date: Jul 31 2014

Contract Amount: \$ 22,000

Contract Party Information

Company Name: Apple

Required fields are marked with a red asterisk.

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, Insurance Certificate expirations, Approval information, and Renewal details.

Contract Creation

Contract records may be created by members of the Admin, Contract Creator, Contract Manager, Contract Owner, Professional Services, Sales, and Sales Manger groups.

Contracts may be created in one of two ways:

- Hitting “New” in the Contract Table action bar
- Using the **Create Related Contract** button in the Related Contracts/Renewal tab to create a renewal, subcontract, or amendment from

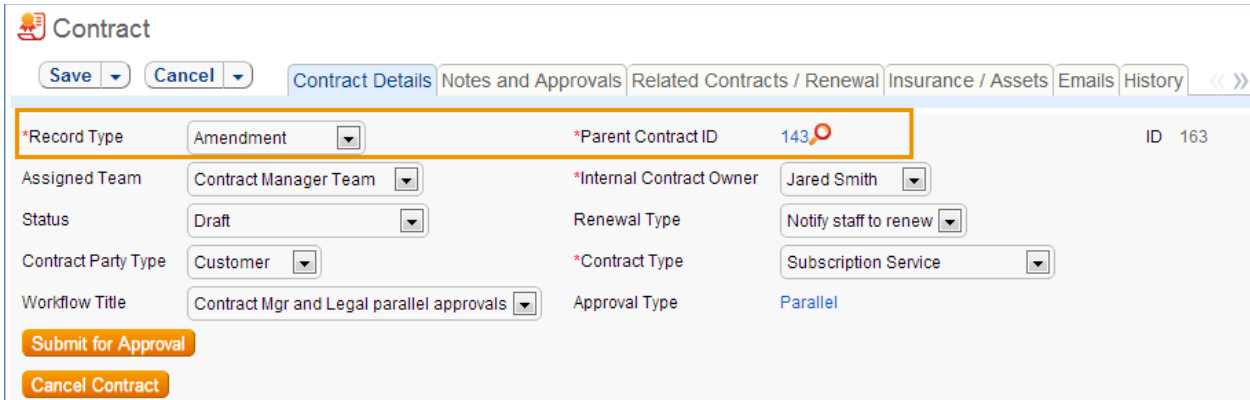
the current contract. This button is available only if the contract is not in a Status of Draft, Pending Contract Manager, or Pending Approval.

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 *Related Contracts/Renewal* 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 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 be linked to a Parent contract.

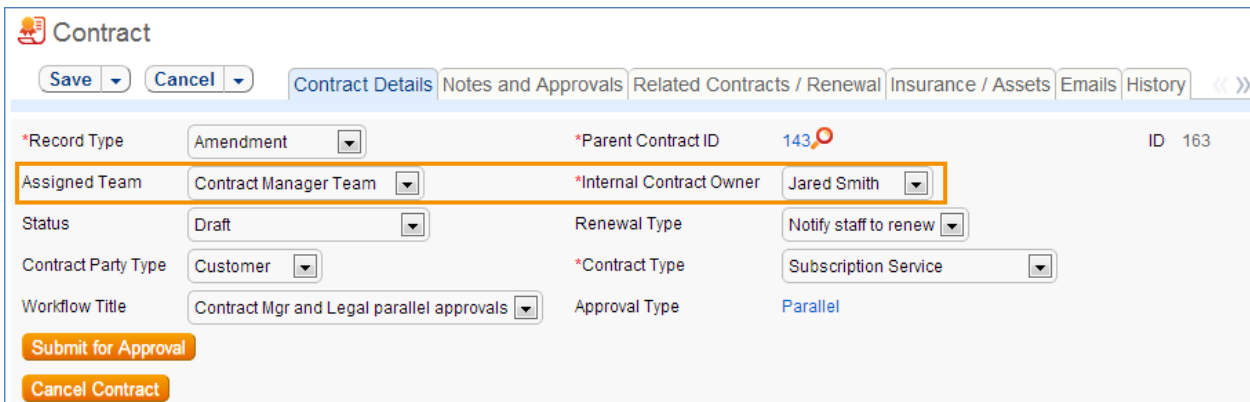


The screenshot shows the 'Contract' form with the following fields and values:

*Record Type	Amendment	*Parent Contract ID	143	ID	163
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. This field is changed automatically by the system during the Approvals process. The default **Internal Contract Owner** is the user who creates the contract record. The list of available choices is filtered to users who are in the Contract Owner Team or the Contract Manager Team. Users in the Admin Group may manually change the **Assigned Team** and **Internal Contract Owner** if needed.



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

*Record Type	Amendment	*Parent Contract ID	143	ID	163
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

All contracts are created with a default Status of Draft. The contract Status is changed automatically by the system at appropriate places in the workflow, however users in the Admin group may manually override the Status if necessary.

Information about the contract requester, company involved, and locations the contract covers 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 **Create and Attach** button at the bottom of the first record tab generates an MS Word copy of the current contract using a template and automatically attaches the file into the **Contract Files** field.

Attached Contract Files	
Contract Files	<input type="button" value="Attach/Manage"/> <input type="button" value="Create and Attach"/>
	<input type="text" value="1. Western Digital-SLA-233.docx"/>
Inbound Contract Files	<input type="button" value="Attach/Manage"/>
	<input type="text" value="No Files Attached"/>

Notes relevant to the contract process are entered into the three notes fields on the Notes and Approvals tab. The **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.

Notes to/from Contract Party	
Notes To/From Party Contacts	<input type="text"/>
<input type="button" value="Send Notes to Outside Party"/>	Sent to Party By
Approval Notes	<input type="text" value="[EWSystem Jun 28 2013 16:12]"/> The vendor has signed it and it is ready to go.

Information about the renewal process is stored in the Related Contracts/Renewal tab. Fields for capturing the renewal notification date, the renewal cost, the 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 and insurance certificates can be linked to individual contracts through the Insurance/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 Notes and Approvals Related Contracts / Renewal **Insurance / Assets** Emails History

*Record Type Contract Parent Contract ID ID 18
Assigned Team Compliance Team *Internal Contract Owner Helen Jensen
Status Active Renewal Type Notify staff to renew
Contract Party Type Customer *Contract Type Subscription Service
Workflow Title Approval Type

Cancel Contract

Insurance Certificates

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 ↓	Status	Type of Certificate	Amount of Coverage	Expiration Date	Attached Files
<input type="checkbox"/>		7	Valid	Professional Liability	\$10,000.00	Oct 06 2013	
<input type="checkbox"/>		6	Valid	General Liability	\$25,000.00	Sep 16 2013	

Number of Valid Insurance Certificates 2 **Calculate**

Insurance Certificates are added by hitting the ‘New’ button in the related table shown above. When possible, insurance certificates should be created from within the contract record to which they apply. For more information on Insurance Certificates, refer to the section titled *Insurance Certificates Table*.

Depending on the selection in the Asset Involvement field, different fields appear for the user to input linked assets.

Contract

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

*Record Type Subcontract *Parent Contract ID 142

Assigned Team Contract Manager Team *Internal Contract Owner Robert Barash

Status Pending Approval Renewal Type Notify staff to renew

Contract Party Type Vendor *Contract Type Service Contract

Workflow Title Contract Mgr and Legal parallel approvals Approval Type Parallel

Cancel Contract

Insurance Certificates

Status: No records.

New Mass Edit Delete Unlink Actions Views Search

Number of Valid Insurance Certificates 0 Calculate

Asset Information

Asset Involvement For Software Application

Software Title/Version Choose one For One or More Assets Software Manufacturer

Type of License For Software Application Number of Licenses

Date of Latest Purchase No Assets

Responsible Team Responsible Person

Save Cancel

For hardware assets, use “For One or More Assets”. For software assets, use “For Software Application”. For contracts with no linked assets, use “No Assets” from the Asset Involvement drop-down.

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 hit 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.

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 section titled *Workflows Table*.

Contract

Save Cancel Contract Details Notes and Approvals Related Contracts / Renewal Insurance / Assets E

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

Contract

Save Cancel Contract Details Notes and Approvals Related Contracts / Renewal Insurance / Assets E

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

Submit for Approval

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 **Notes and Approvals** Related Contracts / Renewal Insurance / Assets

*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		

The Approval teams 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

Contract

Save Cancel Contract Details **Notes and Approvals** Renewal Details Assets Emails History << >>

Assigned Team [Dropdown] *Contract Manager EW Admin ID 28

Status Pending Approval **Cancel Contract**

Contract Party Type Vendor *Contract Type Service Contract

Workflow Title Vendor approval steps w/compliance Approval Type Sequential

Step 1 **Current: Step 2** Step 3 Step 4

Notes to/from Contract Party

Notes To/From Party Contacts [Text Area]

Send Notes to Outside Party Sent to Party By [Text]

Approval Notes

Current Step Title Finance Team Review

Step Number 2 Total Number of Steps 4

Current Approval Team Finance Team

Next Approval Team Compliance Team

Approval Action Choose one **Review Completed**

Approval Notes [Text Area]

Approvals Received

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

Unlink Search [Icons]

Edit	ID	Approval Team	Approval Status	Approved/Rejected By	Date Approved/Rejected
[Icon]	186	Contract Manager Team	Approved	EW Admin	Jun 20 2013 11:45

Once an Approval Action is selected, the **Review Completed** button is hit. 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.

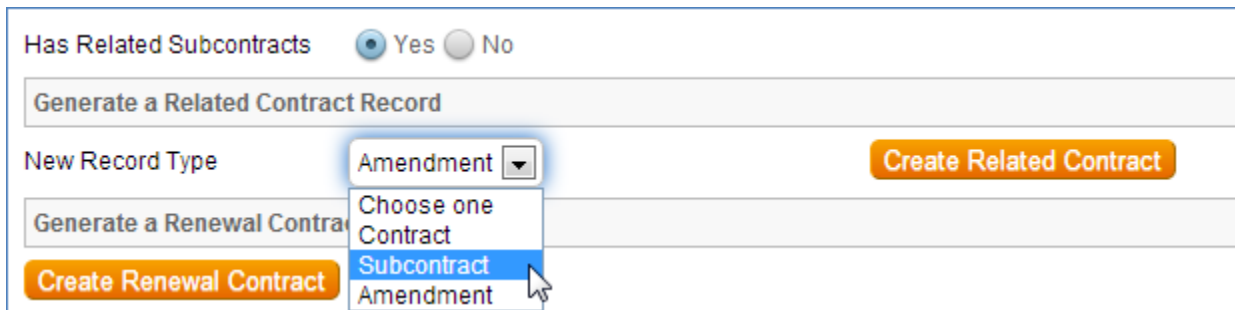
If a user who is not on the current approval team attempts to approve a contract, the system will throw an error and prevent the user from taking the approval action.

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. Different choices show up in the drop down depending on 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. Hitting the **Create Related Contract** button maps relevant information from the current contract into the new one. If the new contract is a renewal, hit the **Create Renewal Contract** button instead. A new contract generated in this way may be edited before saving.



The screenshot shows a user interface for generating related contracts. At the top, there is a section titled "Has Related Subcontracts" with two radio buttons: "Yes" (selected) and "No". Below this is a section titled "Generate a Related Contract Record". It contains a "New Record Type" dropdown menu currently set to "Amendment". To the right of this dropdown is an orange button labeled "Create Related Contract". Below the "New Record Type" dropdown is a section titled "Generate a Renewal Contract" with an orange button labeled "Create Renewal Contract". The "New Record Type" dropdown menu is open, showing three options: "Choose one Contract", "Subcontract" (highlighted in blue), and "Amendment". A mouse cursor is pointing at the "Subcontract" option.

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** fields manually.

Renewal Working Notes			
Days in advance to notify for renewal	45	Renewal Notification Date	Jul 01 2014
Renewal Email Sent on		Renewal Cost	\$ 20,000
Renewal Notes	<div style="border: 1px solid #ccc; height: 100px;"></div>		
Renewal Contract			
Renewal Contract ID	<input type="text"/>	Renewal Contract Start Date	
Renewal Contract Title	<input type="text"/>		
Previous Contract Information			
Renewal Contract	<input checked="" type="radio"/> Yes <input type="radio"/> No	Previous Contract ID	163
Previous Contract Title	Hosted service subscription for one year		
Previous Contract End Date	Jul 31 2014		
Save <input type="button" value="v"/>		Cancel <input type="button" value="v"/>	
<< >>			

Contract Processing

This section covers the 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 arrives.

Similarly, when the Contract End Date arrives, 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 canceled by hitting the **Cancel Contract** button in the common area. Additionally, users of the Admin Group have the ability to manually change the contract status to Cancelled.

Contract

Save Cancel Contract Details Notes and Approvals Related Contracts / Renewal Insurance / Assets Em

*Record Type Subcontract Parent Contract ID 142

Assigned Team Contract Manager Team *Internal Contract Owner Robert Barash

Status Pending Approval Renewal Type Notify staff to renew

Contract Party Type Vendor *Contract Type Service Contract

Workflow Title Contract Mgr and Legal parallel approvals Approval Type Parallel

Cancel Contract

If the contract has a Status of Approved, two buttons become 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.

Contract

Save Cancel Contract Details Notes and Approvals Related Contracts / Renewal Insurance / Assets Em

*Record Type Contract Parent Contract ID

Assigned Team Contract Manager Team *Internal Contract Owner Jared Smith

Status Approved Renewal Type Notify staff to renew

Contract Party Type Customer *Contract Type Product Support and Upgrades

Workflow Title Customer or Partner 3 approval steps Approval Type Sequential

Send Back for Reapproval Mark as Signed

Cancel Contract

Turning Off Approvals

The 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:

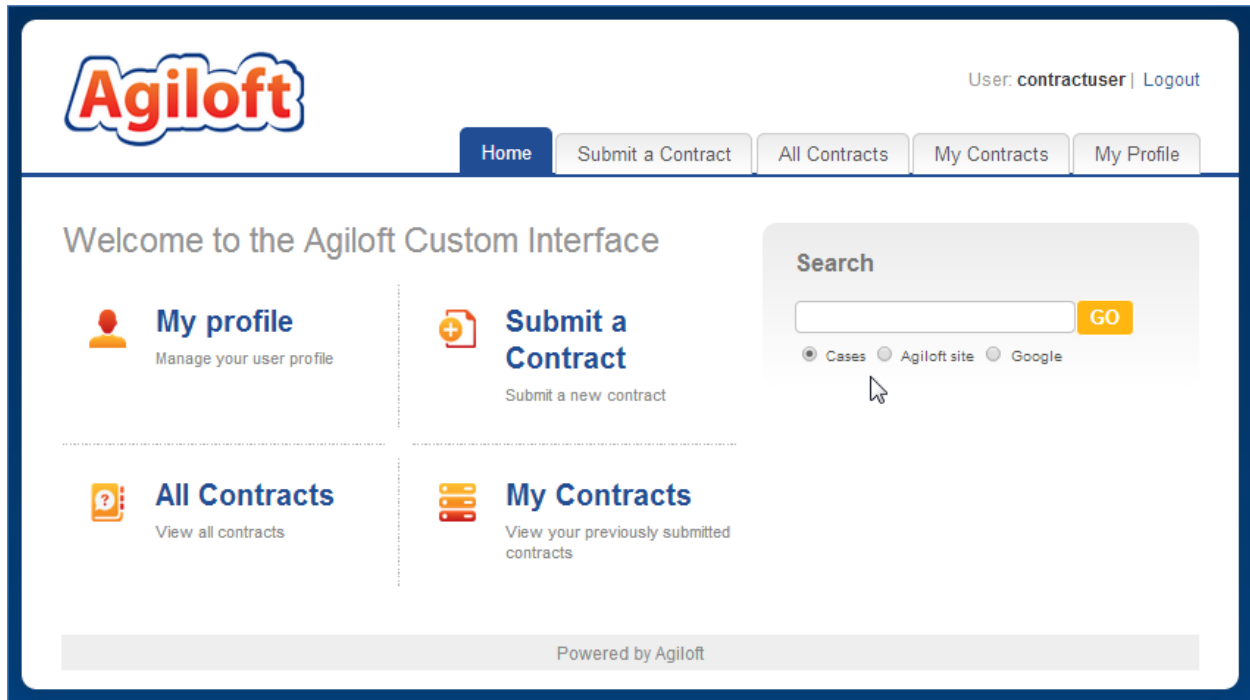
1. Change permissions to allow the Contract Manager Group to change the Contract Status field.
2. Remove status-changing buttons from the Layout: Cancel Contract, Submit for Approval, Send Back for Reapproval, Mark as Signed.
3. Remove the Approval Tab and related fields from the Layout.

For help on how to configure Layouts, please refer to the main Agiloft manual.

END USER USE CASE

This section covers the use case for End Users in the Contract Management context.


Members of the Contract Creator group are internal employees accessing the system via the end user portal. Below is a representative home page for an End User.



Contract Creation


Users in the Contract Creator group may create contracts by hitting 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 via permissions.

Submit a Contract

 Contract

Contract Details | Notes & Renewals | Insurance / Assets << >>

ID: 252

*Record Type: Parent Contract ID: 

Contract Party Type:

Requester Information



For Department: Department Head:

Contract Information

*Contract Title:


*Contract Type:

*Contract Description:

*Contract Start Date:  *Contract End Date: 

Contract Amount: \$

Contract Party Information

Company Name: 

Street Address 1: Street Address 2:

City: Country:

Zip or Postal Code: US State:

State or Province:

Locations covered by this contract

Once the required information is filled in, the contract may be saved for further revisions. The contract requester may also choose to hit 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 section on the home page. A contract requester may edit select fields in contracts he owns. Certain fields like the Contract Amount, Contract Start Date, and Contract End Date among others are not editable by the contract requester if the contract is in a Status of Pending Approval, Approved, Signed, Active, Renewed, or Expired. This is set up 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 section on the Home page.

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.

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: Upon creation 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.

Runs: Upon edits 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.

Edit: All Edit Actions by Web or API

Purpose: This rule handles the processes resulting from changes made by staff or rules.

Runs: Upon edits 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
}
```

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

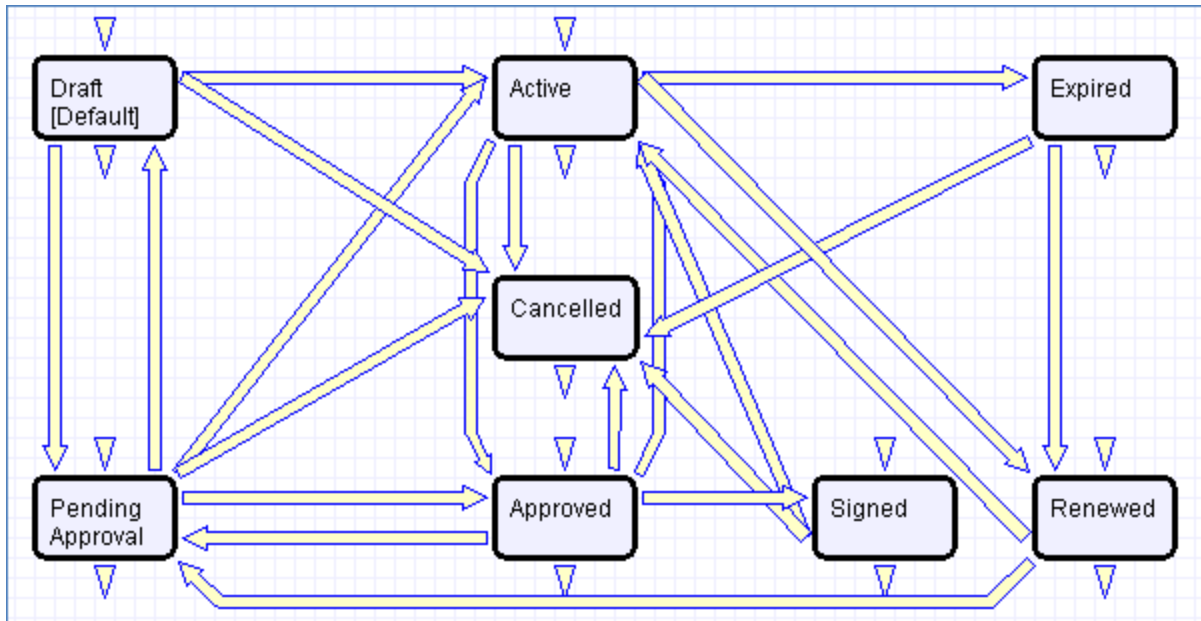
Priority: 5

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 has the following Charts/Reports set up:

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

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.

The screenshot displays a web-based form for creating a document. At the top, there's a header 'Document' with a save icon. Below it are 'Save' and 'Cancel' buttons, and a navigation bar with tabs: 'Details', 'Progress', 'Revisions', 'Emails', and 'History'. The form fields include:

- Status: Submitted for Review (dropdown)
- *Title: How do new employees login to our network? (text input)
- ID: 10 (text input)
- Rush: No (dropdown)
- Document Type: FAQ (dropdown)
- Document Subtype: Choose one (dropdown)
- *Requires Approval: Yes (dropdown)
- Priority: High (dropdown)
- Description: This FAQ explains the process to login as a guest user until your employee login has been created. (text area)
- Format: Edit (button), HTML (radio), plain text (radio)
- Purpose: For new employees to help them work until they have been set up. (text area)
- Document Access: All Internal Users (dropdown)
- Audience: Customers (checkbox), Partners (checkbox), Prospects (checkbox), Employees (checked checkbox), Vendors (checkbox), Executives (checkbox), Media (checkbox), Analysts (checkbox)
- Source Files: Attach/Manage (button), No Files Attached (text)
- Published Files: Attach/Manage (button), No Files Attached (text)
- Published Format: PDF (dropdown)
- Internal File URL: (text input)
- Related Documents: (link icon)
- Submitter: Mia Lazano (text)
- Submitter Department: HR (dropdown)

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

USE CASE

Examples of documents that may be covered: FAQs, 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 (though the records in this table) or documents that are published at the company website, intranet or printed and distributed.

Examples of documents not usually included in this table: SLAs (functionally linked to Assets and Tickets), Contracts (functionally linked to Assets, Tickets, and SLAs)

When the User Status Update field changes from any value to Submitted for Review during the last record modification, the system will set the status of the record to Submitted. In addition, if the Document requires approval, an email will be sent notifying the Approvers of the document submission.

If the User Status Update field changed to In Progress, the system will update the status of the record to In Progress. If the User Status Updated field changed to Published, the system will update the status of the record to Published and notify the document submitter that their document has been published. If the User Status Updated field changed to Cancelled during the last record modification, the system will update the status of the record to Cancelled.

If the Approval status of the document changes from any value to Approved or Rejected and the user is not a member of the Approval Team or is not listed as a Potential Approver, the system will not allow the change to be made and display an error message indicating that the user is not a valid approver. If the document's Approval Status changed to Approved and the status of the document is not Published, the system will set the status of the document to Ready for Publication and email the Publishers and the Submitter that the document is ready for publication.

If the status of the document was Published, the system will email the Submitter that their document has been approved.

If the Approval Status was changed to Rejected, the system will update the status of the document to Rejected and email the Submitter and the Publisher that the document has been rejected.

Creation of Records

Any user may create records in this table.

AUTOMATION

Create/Edit: All Status Changes

Purpose: This handles status changes and notifications to authors and publishers of documents when User status updates occur.

Runs: When created or edited by web, email or API

Search filter: User Status Value Changed

The screenshot shows a search filter configuration for 'User Status Update'. The filter is set to 'In this period: Last User's Modification' with a value of '0' and a unit of 'Minute'. Below this, there are three radio button options: 'Did not change' (unselected), 'changed from: Any value' (selected), and 'to: Any value' (selected).

Priority: 2

Actions:

I: Status field updates

```
if (User Status Update changed from: any value to: 'Submitted for Review' last user's modification) {  
  Set Status to Submitted  
  if (Requires Approval='Yes') {  
    Notify Approvers of Submission  
  }  
} else if (User Status Update changed from: any value to: 'In Progress' last user's modification) {  
  Set Status to in progress  
} else if (User Status Update changed from: any value to: 'Published' last user's modification) {  
  Set Status to Published  
  Email submitted of published document  
} else if (User Status Update changed from: any value to: 'Cancelled' last user's modification) {  
  Set Status to Cancelled
```

Edit: Approval and Rejection Actions (API on)

Purpose: This handles approval and rejection validations, status updates and notifications.

Runs: When created or edited by web, email or API

Search filter: Approval Status changed

The screenshot shows a search filter configuration for 'Approval Status'. The filter is set to 'In this period: Last User's Modification' with a value of '0' and a unit of 'Minute'. The filter options are:

- Did not change
- changed from: Any value
- to: Any value
- Any of Approved Rejected

Priority: 1

Actions:

I: Approval Validations

```
if (Approval Team!<<'Admin Team' and Potential Approvers!~==' System') {  
  Not valid approver
```

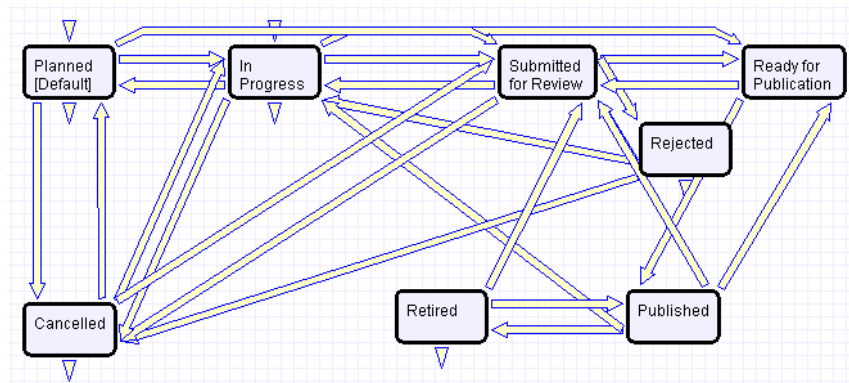
I: Handle approval and rejection

```
if (Approval Status changed from: any value to: 'Approved' last user's modification and Status!='Published') {  
  Set Status to Ready for Publication  
  Email Assigned to and Submitter of approval  
} else if (Approval Status changed from: any value to: 'Approved' last user's modification and Status='Published') {  
  Email submitted of published document  
} else if (Approval Status changed from: any value to: 'Rejected' last user's modification) {  
  if (Status!='Rejected') {  
    Set Status to Rejected  
  }  
  Email submitter and assignee of rejection
```

OWNERSHIP

Records in this table are “owned” by the person that submitted them.

WORKFLOW



REPORTS

The Documents table has the following Charts and Reports set up:

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
<input type="checkbox"/>	Active documents by type	Active documents	Yes	Feb 17 2011 14:57
<input type="checkbox"/>	Approval required	C: Requires approval	Yes	
<input type="checkbox"/>	Created in past 6 months		Yes	Feb 17 2011 14:37
<input type="checkbox"/>	Documents by Status		Yes	Feb 17 2011 14:37
<input type="checkbox"/>	Documents Published Last Month	C: Published Last Month	Yes	
<input type="checkbox"/>	Rejected in past year	Rejected	No	

INSURANCE CERTIFICATES TABLE

Purpose: The Insurance Certificates Table is used to hold insurance certificates. Each record in the table represents one insurance certificate that is linked to a contract.

USE CASE

Insurance certificates are created directly from a particular contract or through the Insurance Certificate main table page. Certificates are created with a default Status of Valid. They may also have a Status of Expired or Contract Inactive.

Ten days before the **Expiration Date** arrives, the Contract Manager Team is notified of the upcoming expiration.

When the **Expiration Date** arrives, if the associated Contract is still in a Status of Active, the system updates the certificate Status to Expired. An email notification is also sent to the Contract Manager regarding the expiring insurance certificate.

If the parent Contract status is not Active, the system updates the certificate status to Contract Inactive to reflect this.

Insurance Certificate

[Save](#) [Cancel](#) [Details](#) [Emails](#) [History](#) << >>

ID	8	Type of Certificate	Other
Other Type	One-Time Auto Insurance for Training Session Travel		
Amount of Coverage	\$ 5,000.00	*Expiration Date	Aug 18 2013
Status	Expired	Attached Files	Attach/Manage No Files Attached

Company Details

Company Name	IBM		
Main Contact	John Suzuki		
Main Contact Phone	333-555-1212:122	Main Contact Email	example@example.com

Contract Details

Contract Title	IBM Annual support contract	Contract ID	14
Contract Amount	\$4,500	Contract Status	Active
Contract Start Date	Jan 21 2013	Contract End Date	Jan 20 2014
Contract Description	Contract for IBM annual support and upgrades on IBM equipment owned by our company.		

Each insurance certificate also contains information about the parent contract for reference.

OWNERSHIP

Records in this table are owned by the creator of the certificate. Specifically, a record is owned by the user whose Login matches the login in the Creator Login field.

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 section titled: Workflows Table.

USE CASE

All approval records are created by the system as a result of actions taken 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 through conversion from within the Contract record. For more information on Workflows, see the section called Workflows Table.

Approval Records

Each Approval record stores the parent record ID, the Approval Team, and the user who submitted the approval. The timestamp of the approval is also captured and displayed.

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.

Approval Template

Save Cancel Details Workflows History << >>

ID 154

Template Details

Approval Status Pending Approval *Related To Contracts

Approval Team Risk Team Approver Agiloft System

Save Cancel << >>

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 in which the current approval template is being used.

Approval Template

Save Cancel Details Workflows History << >>

ID 151

Used in Workflows

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

Unlink Search

<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

Save Cancel << >>

OWNERSHIP

Approval records and Approval Template 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 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: Upon creation by Web or API

Search Filter: R: Related to Contracts

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  
}
```

Edit: All Edit Validations

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

Runs: Upon edits by Web

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 Source for Template Conversion='Approval Template' and Approval Team!<<'Company Team,Support Team,Admin Team,Contract Manager Team,Internal Implementation Team') {  
    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 or API

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

Runs: Upon edits 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' 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','Requires Reapproval' to: 'Pending Approval' during record's last modification) {
      Email Approval Team of Pending Approval
    }
  }
}
```

Edit: By API Retain Rejection

Purpose: This rule ensures rejection records are properly handled when a contract cycles through an approval process.

Runs: Upon edits by Web or API

Search Filter: R: Status changed from Rejected to Requires Reapproval

Priority: 3

Actions:

U: Set Status to Rejected

Updated Field: Approval Status

Updated Value: Rejected

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: Upon edits by Web or API

Search Filter: LF: Last Contract ID just changed

Priority: 1

Actions:

C: [Create Approval Record](#)

Convert to: 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 thus state changes are handled through the rules automation rather than the graphical workflow interface.

REPORTS

The Approvals table and Approval Templates sub table do not currently have any Charts/Reports set up.

WORKFLOWS TABLE

Purpose: The Workflows table holds different pre-determined 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, the Workflow Title, and which table the workflow is used in. Based on the choice of table in the **Used In** field, there may options further specify to which business processes the workflow applies.

Each workflow may have a Workflow Type of 'Parallel' or 'Sequential'.

If a workflow is Parallel, the required Approvals must be specified. 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 hitting 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 steps for the workflow must be specified. Unlike parallel workflows, the system does not generate the entire set of required approval records upfront. 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

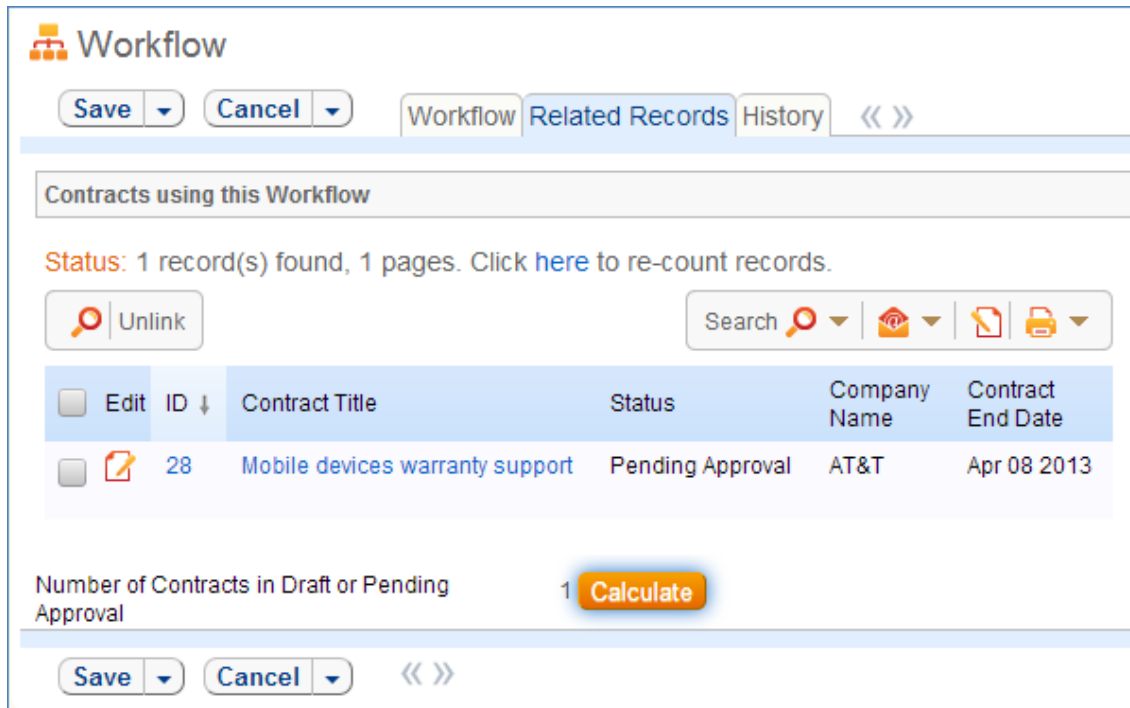
Edit	Step Number ↑	Step Title	Assigned Team	Workflow Title	Previous Step Number	Next Step Number	Total Steps in Workflow
	1	Contract Manager Team Review	Contract Manager Team	Customer or Partner 3 approval steps		2	3
	2	Finance Team Approval	Finance Team	Customer or Partner 3 approval steps	1	3	3
	3	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 hitting the New button. For more information on Steps, see the section titled Steps Table.

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



The screenshot shows a web interface for a 'Workflow'. At the top, there are buttons for 'Save' and 'Cancel', and tabs for 'Workflow', 'Related Records', and 'History'. Below the tabs, a header reads 'Contracts using this Workflow'. A status message indicates '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, and print. A table displays the following data:

<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

Below the table, a summary shows 'Number of Contracts in Draft or Pending Approval' with a value of '1' and a 'Calculate' button. At the bottom, there are 'Save' and 'Cancel' buttons and navigation arrows.

Workflow Statuses

Each workflow may have one of three Statuses:

- Available
- In Use
- Inactive

A Status of 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.

A Status of In Use indicates a workflow that is being used by at least one approval process. The system automatically moves a Workflow into 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 is moved into a status of In Use. If the number of related records is equal to 0, the workflow is moved into a status of Available. Workflows with this Status are not editable in order to ensure business process integrity. For more information on Steps, see the section titled Steps Table.

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 an Available workflow to Inactive if needed.

OWNERSHIP

Records in this table are owned by the user that creates them. Specifically, a record is owned by the user whose Login matches that of the login in the Creator Login field.

STEPS TABLE

Purpose: 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 section titled Workflows Table.

USE CASE

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

Steps may be created directly from the Steps however, it is strongly recommended that steps be created from within 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, Change Requests.

To create the step, the user selects the Previous Step Number from the drop-down and enters the current Step Number into 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

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.

Each step has two possible Statuses:

- Deletable
- Non-deletable

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

A status of Non-deletable indicates a step in an approval workflow that is currently In Use. Specifically, a step is non-deletable if the workflow it belongs to is in a Status of In Use. An attempt to delete a non-deletable step is prevented by the system and results in a pop-up explaining the result.

WORKFLOW

The Steps table contains mostly static data, and thus does not have any associated workflow or actions.

OWNERSHIP

Records in this table are owned by the person that creates them. Specifically, a record is owned by the user whose Login matches that of the login in the Creator Login field.

ADDITIONAL TABLES

SURVEY TABLES

SURVEY TABLE

Purpose: This table can be used to collect customer feedback for Support or Helpdesk cases.

Use Case

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

```

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 access to other parts of the KnowledgeBase. As part of the link, the Support or Helpdesk Case ID and Survey Type are populated in the Survey record linking the Survey to the case that generated the email.

Currently there is no rule in either the Support or Helpdesk Case tables that would generate the email. However, the email template is present in both KnowledgeBases. This functionality can be enabled through an email action in a time-based or update rule. Guidance on how to manually create the URL in the Hotlink 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://support.sample.com/gui2/login.jsp?KeyID=0&kb=EW
%20Support&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=https://www.enterprisewizard.com/survey-thanks.htm&CancelURL=
https://www.enterprisewizard.com/survey-thanks.htm

Automation

All Create actions

Purpose: This handles the conversion of templates into tasks.

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 Contact table.

Reports

Reports are shown in detail in the [Survey Table: Reports](#) in the Appendix A.

Default Group Permissions

Default group permissions are shown in detail in the [Survey Table: Default Group Permissions](#) in the Appendix A.

SURVEY ANSWER TABLE

Purpose: This table contains narrative survey answers that are displayed in the Survey and their associated numeric values.

Survey Answer

Save Cancel Details History Communications << >>

ID 6

*Answer Very Satisfied *Number Value 10

Created By EW Admin Date Created Sep 07 2008 11:39

Updated By EW Admin Date Updated Sep 09 2008 22:37

Save Cancel << >>

Use Case

The Survey Answer table is a special table used in the Survey table. Records in this table display Survey Answers as narrative text in the Survey. Each narrative Survey Answer has an associated numeric value that is used in the calculations of survey averages.

Ownership

Records in this table are “owned” by the person that submitted them.

Fields

Fields are shown in detail in the [Survey Answer Table: Fields](#) in the Appendix A.

Default Group Permissions

Default group permissions are shown in detail in the [Survey Answer Table: Default Group Permissions](#) in the Appendix A.

TASKS TABLE

Purpose: The Tasks table is a table that can be used to support any of the applications included in the Demo KB, such as Sales, Helpdesk, Change Requests, Support Cases, and so forth. Tasks may be related to records in any other table and multiple tasks shown as an embedded table within those records.

Task

Save Cancel Task Details Time Spent Emails History

ID 11 Related To Opportunity Contact Support Case
 Helpdesk Case Change Request Asset

*Title Database installation and upgrade

Task Type Task Date Due Jan 04 2013 12:00
 Status Incomplete Date Done
 Assigned Team Assigned Person Chris Caldwell
 Estimated Hours to Complete D H M
 Description Need to install latest release of MS SQL
 Working Notes

Change Request Information

Change Request ID	18	CR Status	Approved
Change Summary	Need to upgrade MS SQL database to latest service pack		
CR Requester	Chris Caldwell		

Save Cancel

USE CASE

Several types of tasks are available by default (see the Type of Task choice field below), and while some have a scheduled time, they do not automatically create Calendar records. Consider the Tasks table a "To Do" list rather than a schedule of activities.

Tasks can be created directly in the Task table or via the "New" button of the related Tasks (or Activities) tables in Contact, Opportunity, Helpdesk, Support, or Change Request records. Only members of the Support Staff, Sales, or Admin groups may create Task records. Additionally tasks can be created through conversion from a Task template.

Admins and members of the Support Staff and Sales groups can view and edit Tasks. No other groups have access to the table by default. Tasks can only be created in the "Incomplete" state. A rule is set up to send a notification to the Task's assignee when the task is due between 10 and 20 minutes in the future. Scheduled tasks - those of type Online Meeting, Onsite Demo, or Field call - are automatically marked as Done and the Scheduled Date populated into the Date Done field, by a rule. These rules are disabled by default in the demo system, but can be turned on by editing the rule and choosing the radio button to enable the rule on the first screen.

If a task is created or edited and the Time Spent field has a value, a conversion action will convert the Time Spent into a Time Entry record and reset the time entry fields to allow for future entries. The conversion will include the ID fields of the

Support Case, Helpdesk Case or Change Request if the task is associated with a record from any of these three tables. This will allow all time to be shown at the higher level.

When a task is created, a rule populates the Linked Company field with the appropriate value from the opportunity, contact, or support case with which the task has been linked.

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: 1

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 (Source Template Task ID!=NULL and Estimated Hours to Complete!=0 days 0 hours 0 minutes) {
    Set Date Due based on Est Hours To Complete
}
if (Assigned Person=NULL) {
    Email Assigned Team of New Task Assignment
} else {
    Email Assignee of New Task Assignment
}
```

Create/Edit: Convert time entry

Purpose: This handles conversion and resetting of task time entries to Time Entry records.

Runs: When created or edited by web, email or API

Search filter: R: Time spent is not empty

Priority: 1

Actions:

C: Convert to Time Entry

U: Reset time entry fields

TB: close activity automatically

Purpose: This handles updates to the Date Done and Status fields when the due date has passed for Online Meetings, Onsite Demos or Field Calls.

Runs: At selected intervals, every ten years at 12 PM

Search filter: Scheduled event passed

(Task Type	equals, =	Value	Online Meeting	<input checked="" type="checkbox"/> now		
or	Task Type	equals, =	Value	Onsite Demo	<input checked="" type="checkbox"/> now		
or	Task Type	equals, =	Value	Field Call	<input checked="" type="checkbox"/> now)	
and	Status	does not equal, !=	Value	Done	<input checked="" type="checkbox"/> now		
and	Date Due	is greater than or equals, >=	1	Minutes	old		

Priority: 3

Notes: This time-based rule is disabled. If enabled, the schedule will need to be adjusted accordingly.

Actions:

U: set closing information

TB: notify of upcoming activity

Purpose: This handles notifications to assignees when the due date will occur within the next 10 to 20 minutes.

Runs: At selected intervals, every ten years at 12 PM

Search filter: Upcoming activities

	Status	does not equal, !=	Value	Done	<input checked="" type="checkbox"/> now		
and	Date Due	is less than or equals, <=	20	Minutes	in the future	<input type="checkbox"/> Limit to	Non-working
and	Date Due	is greater than, >	10	Minutes	in the future	<input type="checkbox"/> Limit to	Non-working

Priority: 2

Notes: This time-based rule is disabled. If enabled, the schedule will need to be adjusted accordingly.

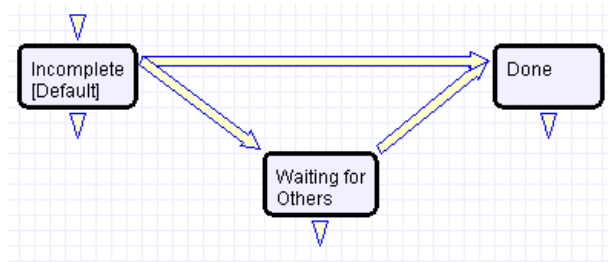
Actions:

E: notify assignee of pending activity

OWNERSHIP

Records in this table are “owned” by the individual assigned to complete the task, so each record is associated with a particular user from the Contact table.

WORKFLOW



REPORTS

Fields are shown in detail in [Task Table: Reports](#) in Appendix A.

SAVED SEARCHES

Saved Searches are shown in detail in [Task Table: Saved Searches](#) in Appendix A.

DEFAULT GROUP PERMISSIONS

Default group permissions are shown in detail in [Tasks Table: Default Group Permissions](#) in Appendix A.

TASK TEMPLATES TABLE

Task Template

Save Cancel Task Details Background History << >>

ID 9 Related To Opportunity Contact Support Case Helpdesk Case Change Request Asset

Subtype of Problem New Employee Setup

Estimated Hours to Complete 2 D 0 H 0 M

*Task Title Set up Standard Desktop Computer Template Status Active Inactive

Default Task Status Incomplete Task Type for Conversion Task

Assigned Team Support Team Assigned Person Chris Caldwell

Description Provide standard desktop computer for office user with standard desktop applications installed

Save Cancel << >>

USE CASE

The Task Templates table is used to hold templates that are used to auto-generate tasks for a new Helpdesk Case. It could be expanded to generate tasks related to other tables as well, if needed. Currently, the only templates created are for New Employee Setup requests in the Helpdesk Case table.

A selection of “Service Request” for Type of Problem and the selection of “New Employee Setup” for Subtype of Problem will cause a field called “New Tasks” to become visible. This field is a link to a single field with multiple values enabled (Task Title) in the Task Templates table, displayed as checkboxes and filtered to the appropriate templates for New Employee Setup.

Three fields control which templates are visible within other tables: the choice field “Subtype of Problem” (which uses the same choice list as for Subtype of Problem in the helpdesk cases table), Related to (which lists the table for which the template is relevant), and “Template Status.” Only templates with an Active Status are shown for which the Related to matches the relevant table and, in the case of Helpdesk Cases, the Subtype of Problem matches the value in the current Helpdesk Case record.

Other fields may be added to the Task Templates table to match on other fields for other tables, i.e. Change Request/ Change Category or Asset/Asset Type. They could then be used to filter templates for auto-creation of Tasks in one of these other tables.

When creating templates for New Employee Setup, be sure to choose that value in the Subtype of Problem field so the template will appear. The Task Title field is the value that is displayed for the Task Name in the Helpdesk Case.

You can add any new templates for new employee setup that you want, and any additional templates that you would like to use for other kinds of request or in other tables. Working with the existing function (for New Employee Setup) should be easy. Adding new functionality to this table may require some training or some assistance from our professional services staff.

CONVERSION OF TEMPLATES TO CREATE TASKS

When a user creates a new Helpdesk Case and checks the boxes for specific task templates in the New Tasks field, a linked record update action is run upon saving to map the Helpdesk Case ID into a field in the linked templates called Last HC ID field and also into the Last HC ID Text field with the addition of some separators.

The update to these fields triggers a rule on the Task Templates table to run that checks to see if the Last HC ID Text field value already exists in the All HC IDs converted field. If it does not find the value there, it converts the template into a new Task linked to that HC ID and then copies the Last HC ID Text field into the All HC IDs converted field. This logic is necessary so that if the checkboxes in the Helpdesk Case are changed after it is created, say, a new task is checked, the system will generate that task without generating the others all over again.

These actions are performed by the Rule: Convert Template Task and Actions: Convert Template to New Task and Add to All HC IDs.

The Task Templates table is accessible only to admin users and support managers.

AUTOMATION

Edit: Convert Template Task

Purpose: This handles the conversion of templates into tasks.

Runs: When created by web or API

Search filter: R: Last HC ID Text changed

The screenshot shows a search filter configuration interface. It features a light blue background with several input fields and controls. At the top, there is a dropdown menu set to 'Last HC ID Text', followed by 'In this period:' and another dropdown set to 'Last User's Modification'. To the right of this is a text input field containing '0' and a dropdown menu set to 'Minute'. Below these are two radio buttons: 'Did not change' (unselected) and 'changed from:' (selected). Under 'changed from:', there is a dropdown menu set to 'Any value'. Below that, the word 'to:' is followed by another dropdown menu set to 'Any value'. At the bottom, there is a row of controls starting with an 'and' dropdown, followed by a dropdown set to 'All HC IDs Converted', then the text 'does not contain, !~=' with a dropdown, then a 'Variable' dropdown, then a text input field containing '\$last_hc_id_text', a magnifying glass icon, a checked checkbox, the text 'now', and finally a dropdown menu with a trash icon.

Priority: 10

Actions:

C: Convert Template to New Task

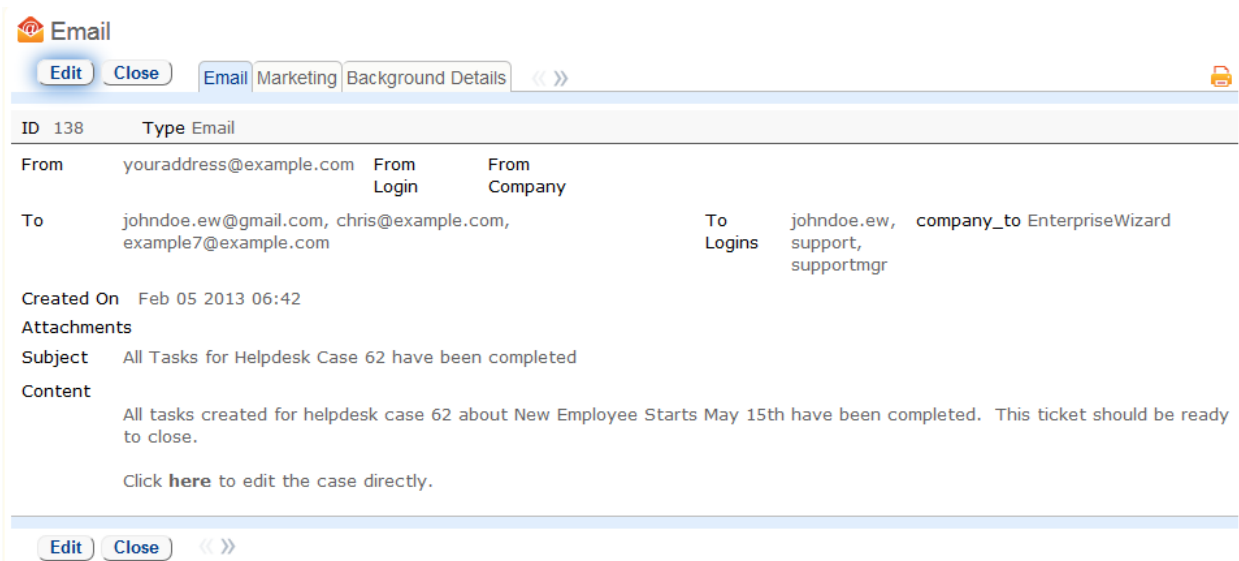
U: Add to All HC IDs

OWNERSHIP

Records in this table are “owned” by the person that created them.

ALL COMMUNICATIONS TABLE

Purpose: This table contains all communications records for the KnowledgeBase. The All Communication table has the following subtypes: Emails, Notes, Voice Calls, Faxes and Tweets.



USE CASE

The All Communications table is a special table and is the extension of the recently added Unifying Communications feature. Unifying Communications allows a user to work with emails in a well-known Outlook style. A user sees all emails that were sent by him in the Sent folder. Inbox folder contains all emails that were sent to the user and received by Agiloft.

In addition to unifying email communications, this new interface also permits the user to see all other kinds of communications if they are enabled. By default Voice Calls, Notes, Faxes, and Tweets are turned off since most customers do not use them.

All Communications are linked to a user contact record field, such as a user email address, user telephone number. If the address is used by more than one user, all users with that user address will share the same Sent and 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. It also includes the ability to reply to, reply to all or forward a selected email.

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 such emails in this interface. The subject line ID encryption will be maintained so that the reply will be linked to the same record as the email that it replies to.

Emails may be sent in several different ways.

- 1) By selecting one or more records in a table and clicking the email icon above the table view.

- 2) By editing a record, navigating to the Communications Search Result field, and clicking the Send email button, or selecting a communication and clicking the Reply or Reply All, or Forward button.
- 3) By clicking the Communications left pane tab and then clicking the Send Email button on the table view
- 4) By editing a record that causes an automatic email to be triggered by a rule or workflow action.

OWNERSHIP

Records in this table are “owned” by the person that submitted them.

ACCOUNTING PERIODS TABLE

Purpose: This table is included in the Demo KnowledgeBase as a sample table to provide 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 a form titled "12 Acct Period". At the top, there are buttons for "Save" and "Cancel", and tabs for "Period", "History", and "Communications". Below the tabs, the form contains the following fields:

- 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: EWSYSTEM

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

USE CASE

The Activity Log table itself is hidden from view and only available from the back end.


OWNERSHIP

Records in this table are “owned” by the person that created them.

ACTIVITY LOG TABLE

Purpose: The Activity Log table is a special table to be 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

The Activity Log table itself is hidden from view and only available from the back end. Only the Admin group has access to the table by default, though the table's tab will remain hidden unless specifically reconfigured.

The Activity Log gives a system-wide history of changes based on pre-defined criteria. You can choose what kinds of activity you would like to track in the system by configuring the activity log. To configure the log, go to Setup/System/Configure Activity Log and add a new rule. The default setup only tracks certain admin activities and certain types of deletions that have occurred in the past month. Both the items tracked and logging duration are configurable in each Activity log record.

OWNERSHIP

Records in this table are created by the system. Ownership cannot be assigned.

CALENDAR TABLE

Purpose: This table contains event records displayed in the Staff-use Calendar pane.

Calendar

Save Cancel Event Communications

*Start Time: Sep 27 2012 10:48 *Duration: 0 D 0 H 30 M

*Description: Send out contract renewals

Personal Invitations: EW Admin Team Invitations

Linked Records

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

Save Cancel

USE CASE

The Calendar table is a special table used in the Staff interface Calendar pane feature. Records in this table display as events in the Calendars for the individuals and groups that they reference. Calendar records are mostly static and do not have any associated workflow, rules, email setup, saved searches or charts.

The Calendar pane is only available to Staff users, and cannot be made available to End Users.

By default, only members of the Admin, Professional Services and Support Staff groups may create Calendar records, and Professional Services and Support Staff may only view their own. No other groups have access to view Calendar entries by default, so other staff groups using the Calendar pane must be individually activated or given view and edit permissions.

OWNERSHIP

Records in this table are “owned” by their creators, and are linked to the creator's login.

CHAT LOG TABLE

Purpose: The Chat Log table is a special table that can be used in conjunction with the integrated chat facility to store chat information and transcripts.

Chat Log

Save Cancel Chat Log Background Communications

ID 1 Type of Chat End User to Staff

Initiator First Name John Initiator Name John Suzuki
 Initiator Company IBM Initiator Login customer
 Initiator Email example@example.com
 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
 Chat Transcript
 Hi, how can I login?

Save Cancel

USE CASE

If the transcript is set to be automatically saved, when one of the users hits the End session button, the transcript will be saved to the Chat Log table. If saving is optional, a popup will appear when they click the End Session button.

Chat transcripts can be automatically or manually converted to records in any table by first setting up a conversion mapping in the Chat log tab to the desired target table, and then creating a Rule Action on the Chat Log table that uses that conversion mapping and defines the level of interactivity for the conversion. This conversion is independent of the option to save the chat transcript in the Chat Log table.

OWNERSHIP








Records in this table are “owned” by the staff member accepting the chat session.

EUI TEMPLATES TABLE

Purpose: This table contains 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.

<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

The EUI Template table is a special table used for storing HTML files used in changing the presentation of the Agiloft end user interface. Since these files undergo little or no change during their lifetimes, no workflows, rules, or actions are associated with them, and no charts, reports or saved searches exist for this table.

OTHER GLOBAL SETUP

LICENSES

The License section under the Setup tab allows administrators to manage licenses, request new licenses, and view usage of current licenses.

ACCESS

The Access section 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 Import and Export tabs under Setup are wizards 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 regarding what data to be exported/imported.

SYSTEM SETTINGS

The System section of the Setup interface allows administrators to set global variables and KB Time, the time standard used by all fields. Administrators can also edit page headers for the KnowledgeBase, view log files, and configure the Activity Log.

LOCALIZATION

Localization assists administrators in 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.

END USER INTERFACE

The End User Interface setup tab is where you define the FAQ interface and what it should show, and also define the default search and view to be executed for users when they click the My Items tab for any table they have access to. The other tabs in the End User interface are dynamically generated based on group permissions of the user logged in, and their visibility is determined by those permissions.

The Search FAQ tab allows end users to search and view FAQs, which are by default set up for both the Support Cases and Helpdesk Cases tables to be records in which the Published field= Yes

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

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 the Setup/End User Interface/My Items setup screen.

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

The Chat tab is visible based on the administrator setup of Chat. If visible, it allows End Users to request a support chat with a member of the Staff team designated to handle chat requests. When a user requests a chat, a notification is sent to logged in members of that staff team. In the Demo KnowledgeBase, members of the Support Team receive chat requests. If no Support Team members are logged in the chat will not begin.

CUSTOM LOOK & FEEL SCHEMES

Agiloft allows you to apply different colors, fonts and image schemes to different teams. The user's Primary Team sets Look & Feel. The Demo KnowledgeBase gives all teams the same Look and Feel, but this is configurable under Setup/Look & Feel.