

# What's New

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Agiloft's minor software releases happen continuously throughout the year, while major releases happen about twice per year. This page highlights some of the most important recent enhancements to the software.

The Current Build Number listed here corresponds to the last time this page was updated, not necessarily the latest release of Agiloft.

Current Release Number	Current Build Number
10.3	Release-2018_02-23950

You can find the latest Agiloft downloadable installer at <https://www.agiloft.com/ewdownload/>, or contact [Support](#) to request an upgrade if your knowledgebase is hosted in the cloud. The most recent release notes from the last major release can be found here: [Release Notes](#).

# Dashboards Redesign

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The Dashboard of the Power User Interface has been significantly redesigned, allowing users to create responsive tile-based widgets, showing a quick view of record progress and saved searches related to you. Previously, this was called the Home Page.

## Example

The video below shows how the dashboard can be used in action, with the various widget types, operations, and filters that can be applied to a user's home screen.

From here you can launch actions that are of interest to you and see various charts showing the state of records. It acts as a home page by providing access to appropriate information immediately upon login, such as a list of open assigned incidents, and displays relevant charts and reports. The power user can see high-level overviews of actionable information and quickly assess needed action.

Internal hotlinks can be added to the widgets to give direct Create access to records in any table, views of any saved searches on any tables, and so on.

For more information, see [Dashboards](#).

### Resource Number

2104

# JavaScript Rendering for Graphical Charts

Graphical charts can now use JavaScript to render the chart. In the Chart setup, the output format for graphical charts has a new option - Use JavaScript Charts.

JavaScript charts are dynamically sized depending on the screen dimensions, and allow you to interact with them by selecting and deselecting the X Axis data. They are particularly useful for [Dashboards](#), where they are used for all [Chart Widgets](#).

### Resource Number

2098

# Drill down capability for JavaScript charts

When creating a JavaScript graphical chart, a new tab has been added to the chart wizard: "Drill Down". This tab allows you to create drill-down layers from the chart fields, so that if a user clicks a section of the chart they will immediately open a new chart with details about that section. Multiple drill-downs can be added to a single chart, and they will be drilled down in the order they are listed in the Manage drill-downs section. For more information, see [Drill Downs](#).

## **Resource Number**

2126

# Global Variable to use JavaScript charts in the dashboard

A new global variable was added to give administrators the option to convert all charts to the new JavaScript interactive charts in the new dashboards. The variable is called "Always use JavaScript Charts". If the variable is set to No, the dashboard will format charts based on each individual chart's setting in the main chart wizard.

For a better user experience, we recommend in most cases setting this new global variable to Yes. This will make all charts used in the dashboard interactive and allow new drill down capabilities.

## **Resource Number**

2125

# Keyboard Shortcuts Redesign with Personalization Options

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Keyboard shortcuts in Agiloft have been greatly improved, with a set of useful default key combinations, new setup options, and improved functionality within the system. Shortcuts allow power users to navigate through the Agiloft interface and perform labor-intensive tasks much more quickly.

## Example

The following video illustrates how to use shortcuts in a knowledgebase:

For more information, see [Keyboard Shortcuts](#).

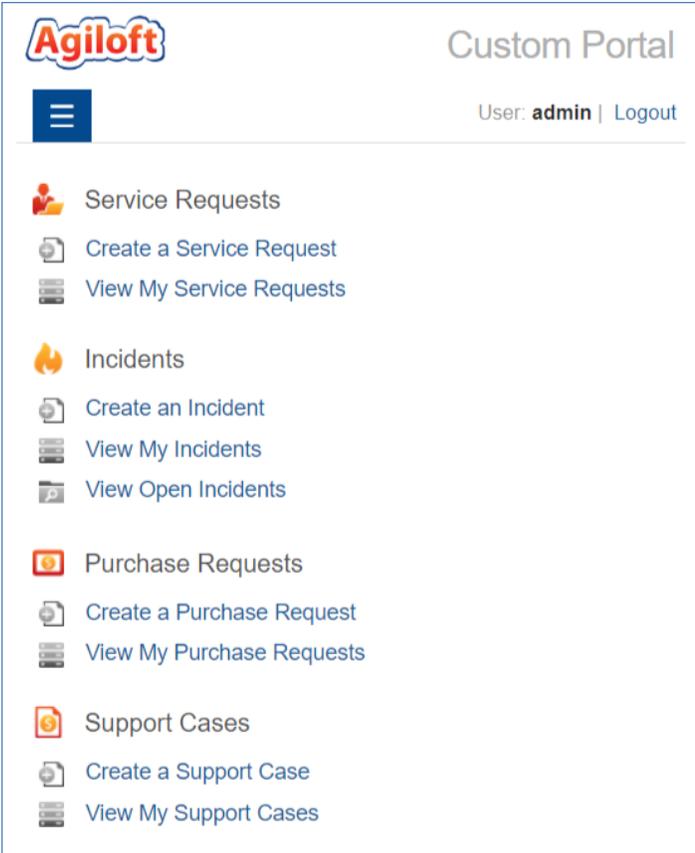
## Resource Number

2104

# Responsive Layout for the End User Interface

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The End User Interface now has a responsive layout, which automatically adapts to changing screen sizes such as mobile devices.



## Resource Number

2104

# "Temporary Instructional" display option was added for text fields

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The Display tab of the Short Text and Text field wizards now contains an option to enter instructional text. This will appear as greyed-out text in the field body, and will disappear once the user begins to enter text in the field.

This setting allows you to enter instructional text that is displayed to the user about how to enter data in this field. The text in this field will disappear once a user begins to enter data into the field.

Temporary Instructional text:

Enter a short description of the incident



Incident Description

Enter a short description of the incident.

## Resource Number

2118

# New global variable "LDAP read timeout"

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A new global variable was added to the list of variables in the power user interface: "LDAP read timeout". By default the value of this variable is 10 seconds. This changes the timeout for running queries via Active Directory; for example if the LDAP Filter uses a complex search that runs over the 10 second default timeout restriction.

<b>Add</b>	LDAP read timeout	<b>Name:</b> ldap_read_timeout <b>Description:</b> LDAP read timeout <b>Type:</b> Integer <b>Allowed Values:</b> Any well-formed value <b>Units:</b> Seconds <b>Default Value:</b> 10
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## Resource Number

2083

# Removed Code Base for Pre-2015\_02 Releases

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The code base was cleaned up, and as a result we no longer support releases prior to 2015\_02 with a direct upgrade path. If you are running a version of Agiloft with a release date prior to 2015\_02 you must upgrade to the 2017\_01 release before installing a later version. See [Upgrade Guide](#) for more information.

## **Resource Number**

2090

# DocuSign Improvements

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Several enhancements were made to the DocuSign integration functionality:

## Print template tag for the DocuSign "Decline" button

The DocuSign "Decline" button now has a print template tag. The correct syntax is:  
`$docusign:Decline::Signer1`

### Resource Number

2096

## DocuSign users can be authenticated as another DocuSign user

In the DocuSign integration, it is now possible to add users either with their own login details, or through another authenticated user's access tokens. In the DocuSign Users table, there is a new "Authenticate" setting with two options:

- **With username** - Enter a unique login and password and click Grant Access to DocuSign.
- **As another user** - Use the lookup to import another user account that has already been granted access to DocuSign in the knowledgebase.

This allows you to assign multiple users to a single company DocuSign account.

Authenticate	<input type="radio"/> With username	<input checked="" type="radio"/> As another user	Access Granted	No
*As DocuSign User	<input type="text" value="olga.mingulova@agilof"/>			
<p>User must be authorized to send envelopes/documents. If you are self-registering, please choose "Authenticate with username" and type in your DocuSign User Name(Email) and Password to grant access. The password will not be stored locally. If you are a DocuSign Account Administrator you can grant access to other users either by choosing "Authenticate with username" and typing in their User Name/Email and leaving the password field blank or by choosing "Authenticate as another user" and selecting an existing DocuSign User in the "As DocuSign User" field.</p>				
<input type="button" value="Grant Access to DocuSign"/>				

### Resource Number



# Document Conversion Action "Convert PDF to Word"

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In the Convert Document Format Action, a new document conversion type was added: "Convert PDF to MS Word".

<b>Document Conversion Type</b> Convert PDF to MS Word ▼
<b>Source File</b> Attached File ▼
<b>Destination File</b> <input type="radio"/> Open document(s) in browser <input checked="" type="radio"/> Store document(s) in file field <b>Merged File</b> ▼ <input checked="" type="radio"/> append the file to this field <input type="radio"/> overwrite any existing files in this field
<input checked="" type="checkbox"/> Use Hosted MS Word Service to convert documents

Previously this action only allowed conversions to happen from MS Word to PDF. The new action has the same options as before. For more information, see [Document Actions](#).

## Resource Number

2086

# Email Improvements

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Several enhancements were made to email and SMS processing:

## New global variable "Inbound letters limit"

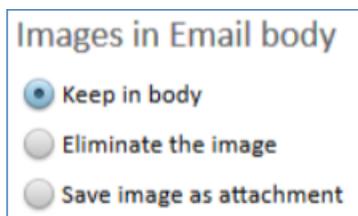
A new variable was added to the Global Variables list in the Power User Interface: "inbound\_processing\_count\_limit". This variable defines how many emails can be received during one pop3 /imap session. For more information see [Global Variables List](#).

### Resource Number

2076

## New options for images in inbound emails

In the Record Mapping tab of the Inbound Email wizard, some new options were added to manage emails in the email body:



If you do not want to keep the image in the email body, you can choose to eliminate it from the incoming email, or save it as an attachment.

### Resource Number

2068

# Group permission settings for Email/SMS

In the Menu Permissions tab of the Table Permissions wizard for group permissions, new settings were added for "Send Emails" and "Send SMS", which control the group's permissions to send email/SMS messages for each table.

<input checked="" type="checkbox"/> Send Emails
Allow creating/editing/deleting of Email Templates? <input type="radio"/> Don't allow <input type="radio"/> Allow group to create and modify/delete saved templates that they created <input checked="" type="radio"/> Allow group to modify/delete all templates
Allow to View and Send Email Templates? <input type="radio"/> Don't allow <input type="radio"/> Allow viewing/sending only their own created templates <input type="radio"/> Allow viewing and sending own and published templates <input checked="" type="radio"/> Allow viewing and sending of all templates
<input checked="" type="checkbox"/> Allow group to publish Email templates
<input checked="" type="checkbox"/> Send SMS

## Resource Number

2056

# Sync Improvements

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Several enhancements were made to the entity set sync process, to eliminate errors and improve tracking.

## External Sync Wizard restricts operations based on the sync direction

In the External Sync wizard, the logic was improved so that the Sync Direction selected on the General tab of the wizard enforces restrictions on the Allowed Operations and the individual field sync options on the Field Mapping tab. Now, if the sync direction does not permit an operation, it will be greyed out in the menu.

The screenshot shows a user interface for the External Sync Wizard. It is divided into two main sections: 'Directions' and 'Allowed operations'. In the 'Directions' section, there are three radio button options: 'Two-way sync', 'Update Agiloft only', and 'Update External System only'. The 'Update External System only' option is selected. In the 'Allowed operations' section, there are six checkboxes arranged in two columns. The left column contains 'Agiloft Create', 'Agiloft Update', and 'Agiloft Delete', all of which are checked. The right column contains 'External Create', 'External Update', and 'External Delete'. 'External Create' and 'External Update' are checked, while 'External Delete' is greyed out, indicating it is not permitted by the selected sync direction.

### Resource Number

2112

## Entity Set Sync now includes Quick Search fields

The Quick Search field list for a table is now included in entity set sync by default. No special settings are needed to enable this.

### Resource Number

2111

# Background processes pause when sync is running

When a knowledgebase is being synced to, background processes are now automatically paused when sync starts. This can prevent sync failures due to these processes. The processes will start again after sync finalization, regardless of whether the sync was a success or a failure.

## Resource Number

2087

# External Sync screen displays error messages

In the External Sync result screen, a new Error column was added to provide a detailed message about any items that failed during the sync.

Synchronization results:

Account

Status: 5 record(s) found, 1 page(s). [Click here](#) to count records again..

<input type="checkbox"/>	Agiloft ID	Customer ID	Status	AccountNumber	Error
<input type="checkbox"/>			❌ Error		The Company Name field must be a "unique value", and a record with the value of NewsWire already exists. Please enter a unique Company Name and try again.
<input type="checkbox"/>	415		👉 Created in Agiloft		
<input type="checkbox"/>	414		👉 Created in Agiloft	1	
<input type="checkbox"/>			❌ Error	123s3	The Company Name field must be a "unique value", and a record with the value of Acc 180614 already exists. Please enter a unique Company Name and try again.
<input type="checkbox"/>	412		👉 Created in Agiloft		

## Resource Number

2113

# Email notification after entity set sync

Email notifications have now been implemented after the finalization of an entity set sync/import. When the sync is complete, all users whose Primary Team is Admin Team will receive an email with the sync results. For more information, see [Entity Set Sync](#).

## Resource Number

2107

# Initiate Salesforce sync from SFDC with an action button

It is now possible to create an action button in the Salesforce Developer Console which initiates a synchronization between the Agiloft knowledgebase and Salesforce. For more information, see [Initiate Salesforce Sync from the SFDC with an Action Button](#)

## **Resource Number**

2093

# Entity set sync speed improvements

Several optimizations were made to the entity set sync process, which made the average time required for synchronization significantly shorter.

## **Resource Number**

2085

# Older Changes

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The changes listed in this section describe some of the major enhancements for releases 2018\_01 and earlier.

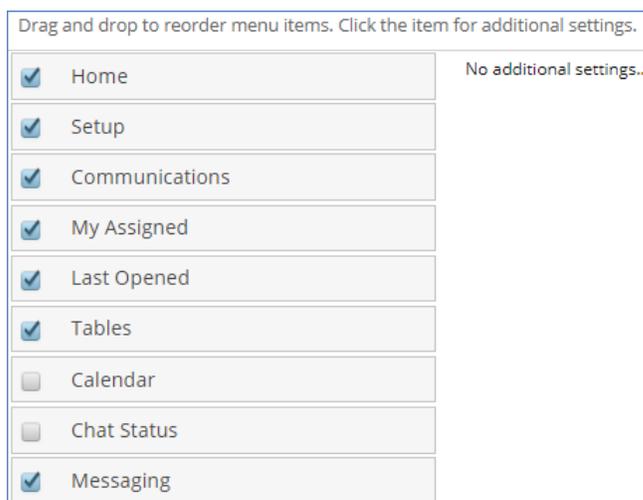
## Left Pane Grouping and Customization Options and Improved User Preferences

Users can now customize and group the left pane items and manage user or team preferences at both an admin and a power user level. For more information, see: [Left Pane Setup](#).

In the **Setup > Look and Feel** menu, three new configuration items are available that allow admin users to configure and apply preferences on a team basis:

Configure left pane menus and table groupings for different teams of users.	<a href="#">Left Pane Setup</a>
Configure default user preferences for system behavior.	<a href="#">General Preferences</a>
Set default mobile interface favorites and tables for different teams of users.	<a href="#">Mobile/ADA Interface</a>

1. **Left Pane Setup**- Use this option to manage which menu items (such as Home, Setup, My Assigned, etc) and tables appear in the left pane. You can also customize the order of the menu items and tables.



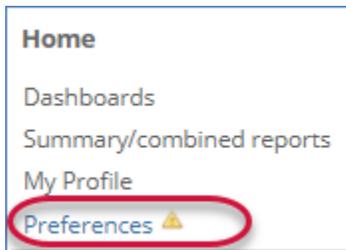
Drag and drop to reorder menu items. Click the item for additional settings.

<input checked="" type="checkbox"/> Home	No additional settings...
<input checked="" type="checkbox"/> Setup	
<input checked="" type="checkbox"/> Communications	
<input checked="" type="checkbox"/> My Assigned	
<input checked="" type="checkbox"/> Last Opened	
<input checked="" type="checkbox"/> Tables	
<input type="checkbox"/> Calendar	
<input type="checkbox"/> Chat Status	
<input checked="" type="checkbox"/> Messaging	

2. **General Preferences**- Use this option to manage interface preferences. For example, you can decide whether record cancellation is confirmed before closing, what page appears upon login, and whether table views show all records or remember the last search.

3. **Mobile/ADA Interface**- Use this option to manage Mobile/ADA interface preferences. Using this option, you can decide things such as the maximum number of saved searches in the Recent Searches window, the maximum amount of text to show in a record, and the position of the field label.

Users may override their team preferences in all of these areas using the new options in the Preferences section of the Home Page. However, when you apply new team-based preferences, the team settings will temporarily override any previously configured user-specific preferences. In such a situation, the user will receive a notification when they next log in to their KB.



When they click the notification, the user can then choose whether to keep or discard the admin changes. When creating new team-based preferences, you can customize the notification message using the Notify existing users about change to their default preferences option found in the Apply tab of all three new configuration items.

The following video demonstrates how to customize your left pane:

#### Resource Number

1984

## Admin Console Redesign with Left Pane

The admin console was redesigned and reorganized, using a left pane interface similar to the Power User Interface. The new interface contains the same items and functionality as before, with a new order to group the items in the admin console. For more information, see [Administrator Console](#).

#### Resource Number

2016

# History Management Options in Rules

On the first tab of the the Rules wizard, you can now define whether a rule should create history entries on running. This can be useful in cases where a rule can trigger other actions and result in overly long history tables.

If the **Do not record history entries** option is selected, the rule will not create any entries in the history table, which can prevent issues from overly large history tables in the database.

## History entry management

- Always record history entries
- Only record history entries when record is modified by actions called by the rule
- Do not record history entries

## Resource Number

2002

# New History Deletion Option

While mass editing or configuring a Delete Action, you can now limit the deletion of history entries to those that are older than a defined number of days. This is useful for tables that have many rules and KBs with large history tables.

Delete History entries

All but the most recent  history entries per record

Do not delete the first history entry for record creation

All history entries created by rule

Approval: Edit: Approval by Email (web)  
Approval: Edit: All Document Approval Edit Actions (web, API)  
Attachment: Create/Edit: Run OCR action (web, API)  
Attachment: Create: All create actions  
Attachment: Edit: Handle To Be Signed changes and Superseding (web, API)  
Attachment: TB: Daily - If Contract Status is not inactive and Status is Contract Inactive, reset Status of Att  
Attachment: TB: Handle Attachment Expiration (disabled)  
Attachment: TB: Notify Internal Contract Owner 30 days in advance of expiration (disabled)  
Change Request: CR - All Creation Actions  
Change Request: CR - Approvals  
Change Request: Change Request - Edit actions (API enabled)  
Change Request: Parent/Child CR Handling  
Change Request: Spawning SC ID update  
Change Request: Spawning SC ID update  
**Change Request: TB Demo Data Update: Update date fields by one month each month so reports have data**  
Change Request: Update group via linked action  
Change Request: Update linked SC do not delete  
Change Request: attachments check  
Company: Create/Edit: Contract Source Actions (API)  
Company: TB Demo Data Update: Update date fields by one month each month so reports have data

Limit deletion to those that are more than  Days old

## Resource Number

2000

# Merge Document action can now output to Word and merge consecutive Word documents

The Merge Document action was improved in a number of ways to increase the options available for document merging, as well as other formatting and layout matters. Primarily, the new wizard allows users to:

- Merge multiple Microsoft Word documents into one Word document.
- During a merge to PDF, select consecutive Word documents for merging before creating the final PDF.

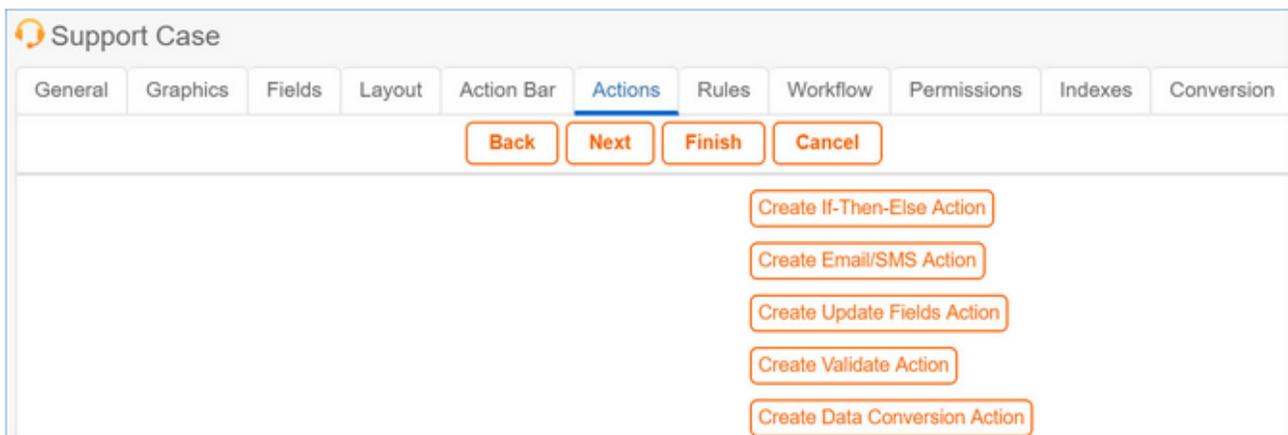
The wizard was also redesigned to make it easier to locate the appropriate options. For more information, see: [Merge Documents Action](#).

## Resource Number

2004

# Actions Tab in the Table Wizard

In the Table setup, a new Actions tab was added, which allows you to create, edit and delete all table actions. Previously this was only possible by editing rules or action buttons.



## Resource Number

## Do Not Validate Required Fields and/or Run Rules with Action Buttons

You can now configure action buttons so so they do not validate required fields or run rules and update default values when selected. For more information, see: [Action Buttons](#).

In this section you can define the order of operations for the actions, and specify any additional behavior such as opening a new window, validating required fields, saving the record, and updating default values.

**Note:** Deselecting "Validate required fields" or "Run rules and update default values" will result in the record being saved in a state where mandatory fields have not been filled in, or where the rules that are active on the table do not run on the record. Exercise caution when disabling these options as there is a possibility for records to be canceled in the middle of being created, in a state where mandatory fields are incomplete, or they cannot be acted upon by normal table rules.

For more information on Action Button setup, see online help [?](#)

Before executing actions:

Do nothing

Save record

Validate required fields

Run rules and update default values

then

Execute Actions

No items to drag Add Action Remove Add Wait Point

Before and after executing the actions specified in the Action Button, the following choices are available when the option is set to Save Record:

- Validate required fields - if deselected, upon activating the button the record can be saved in a state where mandatory fields have not been entered, or entered incorrectly.
- Run rules and update default values - if deselected, upon activating the button the record will be saved without triggering the rules and default value updating that would normally be enforced on the table.

In the After executing actions section, the Validate required fields option is only available when choosing to Save and Open record for edit - this is in order to prevent the record being closed in a state where mandatory fields have not been filled in.

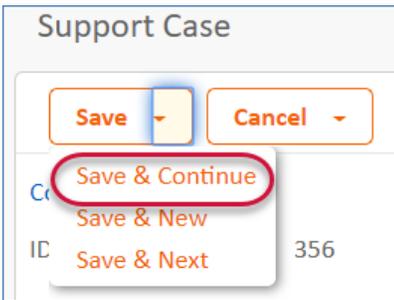
Since these options can result in records being saved in an incomplete state, and then have further rules run on them that could cause issues with business processes, it is advisable to exercise caution when deselecting either of them. By default, both options are selected for existing action buttons where the "save record" option is selected.

### Resource Number

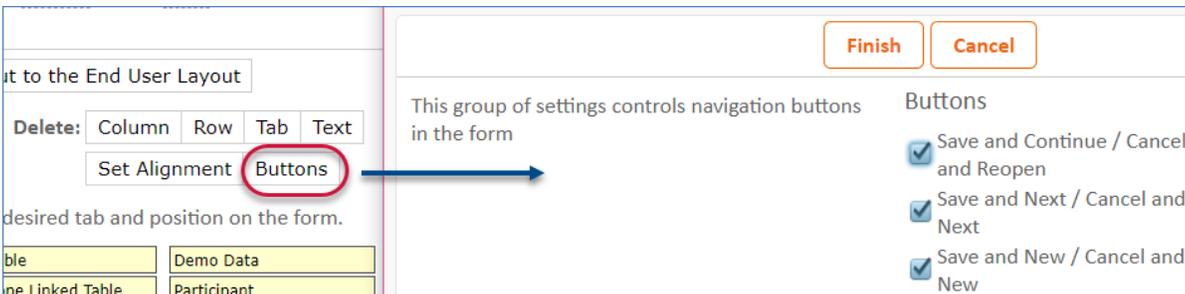
# Save & Continue and Cancel & Reopen Buttons

Two new options were added to the Save and Cancel buttons at the top of record forms:

- **Save & Continue** - this option saves the record, runs any rules triggered by the save action, then reopens the record to the first tab to allow you to continue work on it. This can function as an autosave if you need to save your record progress.
- **Cancel & Reopen** - this option allows you to cancel unsaved changes, then close and reopen the record to the first tab.



These options can also be disabled in the Layout tab of the Table wizard by clicking Buttons.



## Resource Number

2031

# IP Address Access Restrictions

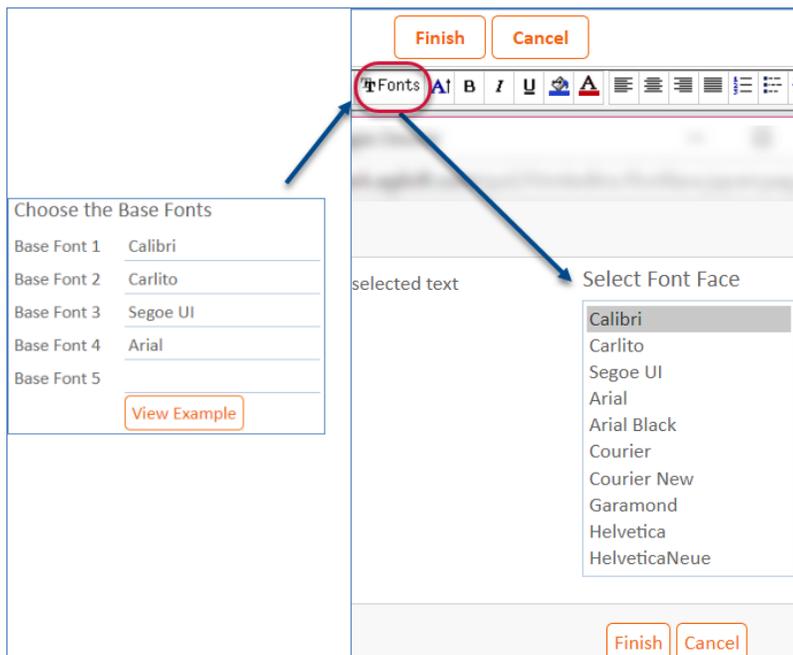
It is now possible to restrict groups from accessing a knowledgebase unless they are located within a specified list of whitelisted IP addresses. For more information, see [Restrict IP Addresses](#).

**Resource Number**

1892

## Base Fonts are Available in the HTML Editor

If fonts have been defined as base fonts in the Global tab of the current Look and Feel scheme - including custom fonts - they are also available for selection in the fonts list in the HTML editor.



**Resource Number**

2020

## Expand and Collapse Sections in Record Layouts

The layout now allows users to collapse or expand the record sections. Not only are users able to click on the section header text to collapse or expand a specific sections, they can quickly choose to expand or collapse all sections using links at the top of the layout.

Save		Cancel		Task Details	
Expand All   Collapse All   Default View					
ID	1133				
Related To	Choose one				

#### Resource Number

1993

## Hide Tabs in Record Layout when Visibility Conditions are Not Met

Previously, tabs in the record layout were only hidden if the user had no permission to view any fields on the tab. Now, if visibility conditions for all fields in a tab are not satisfied for at least one field, the tab is hidden from the user. If the visibility conditions for any field in a tab are changed so the user can view it, the tab is automatically appears.

#### Resource Number

1969

## Charts/Reports Formatting

The Look and Feel wizard now allows you to define the appearance of charts and reports. A new Charts /Reports tab was added to the wizard, at **Setup > Look and Feel > Manage Staff Schemes > edit a scheme > Charts/Reports tab**.

This tab contains the following options:

- **Report Grouping Header** - Defines the font and color scheme for report header groupings.
- **Chart Plot** - Defines the color scheme for the chart background and plot.
- **Chart Legend** - Defines the color scheme for the chart legend.
- **Chart Series** - Defines the color scheme for the chart segments.

For more information, see: [Charts and Reports Tutorial](#).

#### **Resource Number**

1909

## Custom Fonts in a Look and Feel Scheme

Custom fonts can now be added in a Look and Feel scheme, allowing you to make use of any standard format fonts that are not included by default with your knowledgebase.

1. Navigate to **Setup > Look and Feel > Manage Staff/End-User Scheme > Edit Scheme > Global tab** to upload a new font into a knowledgebase.
2. Once fonts have been uploaded, they can be entered as Base Fonts by typing their name into the fields.

For more information, see [Look and Feel End User and Staff Wizards](#).

#### **Resource Number**

1906

## Display Sync Details

When a sync is in progress, you can now see a full list of the items being updated. You will also see whether an item is In Progress, Queued, or Completed.

Running **Tables & Fields updater**. Processing entry 3 out of 8, ETA is 00:00:18



Show less details

Choice lists updater : Completed  
Teams updater : Completed  
Tables & Fields updater : In Progress  
Data Conversion updater : Queued  
Groups updater : Queued  
Records updater : Queued  
Saved Search updater : Queued  
Views updater : Queued  
Email Outbound Settings updater : Queued  
Email Inbound Settings updater : Queued  
Email Template updater : Queued  
Email Personal Inbound Settings updater : Queued  
Actions updater : Queued  
Rules updater : Queued  
Workflow updater : Queued  
Sync Configurations updater : Queued  
L&F updater : Queued  
Images updater : Queued  
Global Variables updater : Queued

## Resource Number

1904

# URL Encryption Function

Created a new `secureHotlink(url)` function which encodes URLs for action buttons to hide the password from browsers. The function treats a URL as a hotlink, retrieves the project name from it, retrieves the public key for it and encrypts the URL as secured hotlink.

**i** For example: `secureHotlink(" http://localhost:8080/gui2/login.jsp?keyID=0&KB=TESTKB&user=admin&passwd=testpassword&state=Main ")` is parsed as:  
`http://localhost:8080/gui2/login.jsp?p=a&genhotlink =  
Aj3ze1xUTq4FziVPB9W5INENQy1xxpLju4lsfbPOxw1XRB  
/MPL8VHo+m72uHf34Bb850nT13m+vhPCU41hVmkMfVVj/YGTEbLzsAobYYfHpv6Y`

If the target server is unavailable for some reason, or the KB details are somehow wrong, an empty URL will be returned, as the key could not be retrieved for encryption.

## Resource Number

1893