

Using the Wiki

The Agiloft Wiki is an online help system for the entire Agiloft platform where users can find instructions and answers about system functionality, as well as administrator and developer content for customizing and extending your system. The Help Wiki stays up-to-date with Agiloft's development and documents the features available in the most current release version.

Click the Agiloft Help logo in the top-left corner at any time to get back to the Topics home page.



Searching

Searching is the most powerful tool for finding the information you need in the Wiki. The Search bar at the top right of the screen provides full text search, as well as more advanced search capabilities using the search query syntax.

To learn more about advanced searches, click the  icon to the right of the search box to open the Search Help window.

Navigating the Wiki

The table of contents is organized to allow you to locate relevant information quickly, according to the level at which you are using the system.

- ▶ Introduction
- ▶ Navigating the Staff Interface
- ▼ Working with Records
 - Creating New Records
 - Editing Records
 - Copying Records
 - Mass Editing Records
 - Formulas
 - Linking Records Together
- ▶ Deleting Records
- **Printing a Set of Records**
- ▶ Printing from Word HTML and PDF Templates
- ▶ Reporting
- ▶ Searching
- ▶ Administrator Guide
- ▶ Developer Guide
- Additional Documentation

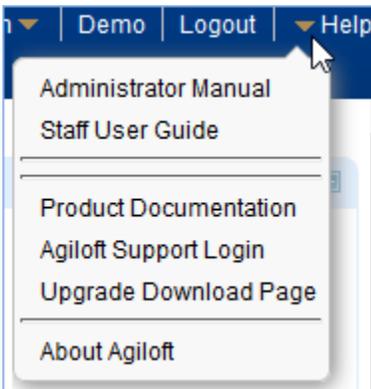
The levels of the table of contents are organized as follows:

- **Introduction** - Introductory topics related to Agiloft and some fundamental system concept definitions.
- **Navigating the Power User Interface** - Information related to the main elements of the power user interface, including the Left Pane, the Table View, the Home Menu, the Inbox and so on.
- **Working with Records** - Describes how to use records in a table, including how to Create, Edit, Copy, Mass Edit, Link, Delete, Print, Search records and more.
- **Administrator Guide** - Topics for system administrators who can access the Setup menu and perform actions such as creating tables, setting access permissions, adding Teams and Groups, importing /exporting KB data, and integrating with other systems.
- **Developer Guide** - Provides developer-level topics about using the SOAP and REST interface, synchronization of system data, using the database, and custom scripts.

Opening the Help from within Agiloft

There are several options for opening the Wiki from within Agiloft.

Clicking the Help drop-down menu at the top right will open the Wiki to the [Topics](#) landing page.



Hovering over the menu brings up a list of additional options for opening the Wiki and other related resources such as the Documentation page, the Support Portal and the Upgrade page.

Whenever you see Help in a drop-down menu or see the help icon  in the interface, these links will open the Wiki to contextual topics related to that specific system area. For instance, clicking the help icon next to Manage Choice Lists in **Setup > System** opens the [Choice Lists](#) help topic.

Feedback

We'd love to hear from you! Send questions and other feedback to docs@agiloft.com

Customization

It is possible to customize the Help from within a knowledgebase by navigating to **Setup > System >**

Customize Help.  You can add a link to additional documentation specific to your knowledgebase, or remove the other links from the Help drop-down.

In the Setup Help screen, the administrator can set a different primary help location if they do not want the primary URL to be <https://wiki.agiloft.com>. For example, setting the primary location to MyCompanyWiki.agiloft.com would cause all topics to be redirected with MyCompanyWiki.agiloft.com as the base URL - so the current topic would become <https://MyCompanyWiki.agiloft.com/display/Help/Using+The+Wiki>. This is primarily to be used for branding purposes, and should be requested through the Support Portal.