

Standard Knowledgebase Guide

This guide describes the out-of-the-box setup of the Standard Knowledgebase (KB). It divides the system into several large functional areas and then describes the tables that are used in those functional areas.

The Agiloft Standard KB contains several modules pre-configured with our best practice setup and automation. Depending on selections made when a KB is created, some of these modules may be fully or partly hidden.

Following is a general overview of what is included:

- [Admin Setup Menu](#) – an overview of the Setup menu options
- [End User Interface](#) – introduction to the end user interface
- [User Roles](#) – overview of managing user permissions and the default user roles.
- [Background Tables](#) – background tables are used by multiple modules and store basic information about people, places, and organizations.
- [Global Process Tables](#) – [approvals](#), [tasks](#), and [time entries](#) are used with several modules including contract management and service desk.
- [Contract Management](#) – manage the contract lifecycle, including e-signature and approval workflows.
- [Service Desk Operation](#) – create an internal or external helpdesk.
- [Project Management](#) – organize projects and manage purchase orders.
- [Sales Automation and CRM](#) – track and automate sales leads, opportunities, and quotes.
- [Document Management Table](#) - the Documents table holds records for published documents.
- [System Tables](#) – includes tables that manage other automation and functions, including the [EUI Templates Table](#) and [Replacement Variables Table](#)

Who Should Read This?

This guide is primarily intended to be used by admin users or system designers who need structural information about the Standard Agiloft knowledgebase in order to customize it.