

Concepts

This topic describes some of the high-level concepts in Agiloft.

Concept	Brief Explanation
Administrator	An administrator is a user who belongs to at least one group that is an administrator group. Administrators use the advanced capabilities of Agiloft to create, administer, and maintain knowledgebases. See: Administrator Guide .
Knowledgebase (KB)	<p>A knowledgebase (KB) is a particular deployment of Agiloft. It contains the entire collection of tables, records, teams, groups, views, reports, and associated data.</p> <p>A given Agiloft installation may include multiple KBs, but each KB is logically independent. Knowledgebases can be exported as a single file in XML format and imported onto another server. The system administrator of one KB cannot overwrite another.</p>
Field	Fields represent the different types of information stored within tables, such as a telephone number. Fields correspond to columns in the database and in table views. See: Fields .
Record	A collection of field values. See: Working with Records .
Workflow	Workflows control record states and the rules that apply when a record moves from one state to another. It may refer to the graphical workflow editor used to create and manage workflows in the Table wizard. See: Workflows .
Table	<p>Tables organize your information within the knowledgebase. A table is the whole set of fields, relationships, and rules on which individual records are based. Tables represent an object in the database with columns, or fields, and rows, or records.</p> <p>Knowledgebases typically contain several different standard and custom tables, such as Leads, Users, Companies, Support Cases, Contracts, and so on. See: Tables.</p>
Subtable	Subtables are made up of specifically defined records within a larger table. Tables can be hierarchical and inherit fields and rules from their parents. For example, Employees and External Users might be subtables of the People table, in which case they would automatically contain all the fields from People table as well as their own unique fields.
Left Pane	The Left Pane displays navigation options within a knowledgebase, such as tables, the Admin Setup menu, the Home menu, and the Last Opened list.
Group	Groups help secure your instance of Agiloft by defining the access permissions that each user has. Group permissions define which tables, records, and fields that users may view or edit, as well as their access to special menu permissions like exporting and setup options. See: Groups .
Team	Teams are used to identify working units of users, such as those that share a role in the system. Teams are used to send email notifications, define working hours, and determine aspects of the interface such as Views and Saved Searches . Users are assigned to a Primary Team and additional teams if necessary. See: Teams .

Report	A summary of record information that may be presented in graphical, HTML, text, or Excel format. See: Reporting .
Search	A filter applied to a table to find specific information. For example "Find all Support Contracts that are due to expire within the next 30 days". See: Searching .
Table View	A table view is what users see when they click on a table from the Left Pane. It includes a view of the records contained within the table as well as the table name, table summary, action bar, and table search block. See: Table View .
View	A view determines which fields from a type of record are shown in a list of records in the table view. Views can include row coloring by issue, search filters, and custom column settings. For example, a "Company Name, End Date, and Value" view would show those specific fields from Contracts. See: Views .
Rule	A statement of business logic that Agiloft executes automatically. See: Rules and Workflows .
Wizard	A wizard is a series of screens and tabs in which you can select options for configuring a specific part of the system. When working in any Agiloft wizard, the left side of the screen has a description of each option, as well as tips and guidance and links to additional information. Wizards are most often used by Agiloft administrators.
Power User	A power user is a user who belongs to at least one group that is a Power User group. Power users can access charts and reports and edit other people's records. They require an assigned power-user or floating power-user license. See: Power User Guide .
End User	An end user is a user who belongs only to a group that is an End User group. End users cannot edit other people's records. They may use an unlimited end-user license.