# Overview

This guide includes basic information about the use cases and processes that are implemented in the Standard System Demo, as well as information on each table. The sections included in the Standard System Documentation guide are detailed, but not all-inclusive. Remember, the system provides additional documentation internally for some features in the form of descriptions, hint text, and warning text.

Some tables are hidden in the Standard System Demo by default, which can easily be changed by going to **Setup > Tables > Active Tables**, and then selecting the table and clicking Unhide. To hide a table, follow **Setup > Tables > Active Tables,** then select the table and click Hide. If you do not plan on using a table, it can be deactivated by going to **Setup > Tables > Active Tables**, selecting the table, and clicking Deactivate.

# Look and Feel of Documentation vs. Your System

The look and feel of Agiloft is easily customizable, with several default color schemes available. You can switch between the pre-built look and feel schemes in your system by going to **Setup > Look and Feel > Power User Interface** and choosing a different scheme. Before applying a new scheme universally, you should test it on a team, such as the admin team, in order to ensure that everything appears as expected.

The term "End User" refers to users who access the system through the End User Interface (EUI). We use the expressions "End User" or "Customer" interchangeably in this document to refer to company employees whose main role in the system is to make requests on their own behalf or for someone else.

We use the term "Power User" to indicate the people who are working on other people's issues. They may be solvers, technical support staff, IT staff, approvers, developers, sales reps, managers, or any other types of users who access the system through the power user 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.

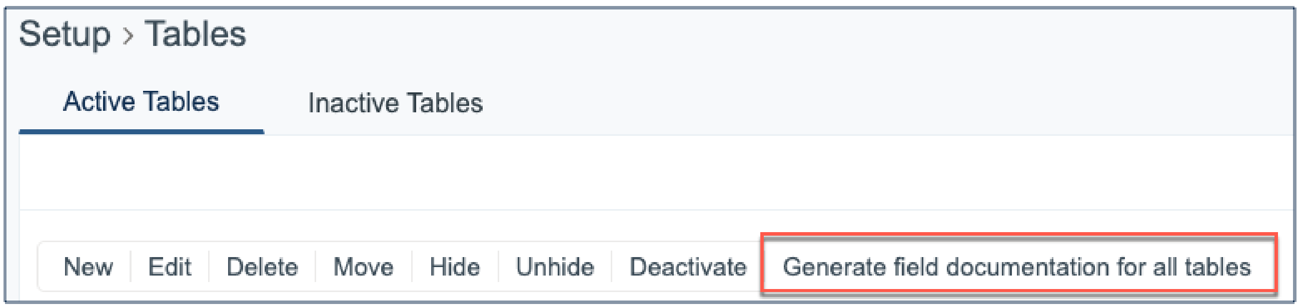
# Self-Documenting Areas of the Program

Agiloft has built in functions that allow you to view summaries of different components in your system. These summaries are then available to print or digitally distribute. This section shows you how to get the system to automatically generate documentation on data such as tables, fields, rules, and permissions. This information is valuable when you are quickly trying to get a high-level idea of what your system consists of, and can be easily shared to communicate the capabilities and structure of a specific system.

# Export Tables and Fields Documentation

It is possible to export all table and field data from the system itself. Since this information changes frequently, this is a very useful option.

To generate an Excel workbook of the current field information for all the tables in the system, go to **Setup > Tables** and select Generate field documentation for all tables.




In the window that opens, you can choose which field qualities to include, as well as how the sheet itself is formatted. Clicking Finish creates a workbook with a worksheet for each table and a column for each choice that was selected on the previous screen.

# Print Rules Documentation

You have the ability to create a summary of the rules from your system. This summary comes in the form of a file that provides most of the information about the rule criteria and actions, though it does not explain the purpose of the rule. Although there are a few ways to create these files, the recommended method is:

1. Go to Setup [Table Name] and select the Rules tab.
2. Click either Rule ID, Priority, or Comment to sort the rules. This is also the order that they appear in the file.
    a. An alternative for determining presentation order is to modify the table view to your satisfaction.
3. Select the rules you would like to include in the file.
    a. You can quickly select every rule by selecting the checkbox to the left of the Edit heading, and then choosing 'Select all found records' from the drop-down list.
4. Hover over the Printer icon and choose Print All Fields.

Print All Fields creates a single file with comprehensive details about a system's rules, which can be saved or printed. If you prefer a file that shows a snapshot of how rules appear in the Rules table, choose Print/Download Table View.

# Print Group Permissions Documentation

You also have the ability to view Group record permission configurations in detail, using a file that shows granular details down to the record level. Generate this file by following these steps:

1. Go to **Setup > Access > Manage Groups.**
2. Edit the group you want to document.
3. Click on the Tables tab.
4. Select the tables you want to include in the file. Verify that the group you are editing has access to all the included tables. You can quickly select every rule by selecting the checkbox to the left of the Edit heading, and then choosing 'Select all found records' from the drop-down list.

   > You can quickly select every rule by selecting the checkbox in the top left and clicking "Select all found records" from the drop-down. To quickly find specific fields in the list, click the column headers to change how the list is sorted.

5. Hover over the printer icon and select Permissions.

For full details on field level and other menu permissions for one or more groups:

1. Go to **Setup > Access > Manage Groups.**
2. Select one or more groups.
3. Hover over the printer icon and select one of the options. These reports take a long time to generate, and create long HTML documents that can be saved as documentation:
   - **All Current Permissions** generates a page that shows all the permissions of the selected group, such as group permissions, and field permissions for each table.
   - **All Permissions with History Log** generates a page similar to All Current Permissions that additionally includes History field permissions as well as a History log at the very bottom. This same History log can be generated individually by selecting History Log only.
   - **History Log** show permission changes tracked by the system. If the only item you need data for is history logs, always use this option instead of running All Permissions with History Log.
   - **Groups permissions comparison report** can be used after selecting two or more groups to compare their record and field level permissions. The Full Details section consists of text that explicitly states record and field level permission comparisons for each group.

# Additional Options

From the same printer icon drop-down list, you can select several additional options. These options all open up additional windows where specific activities are meant to take place:

- **New HTML Template** opens up a wizard that allows you to create an HTML Template. This wizard allows you to adjust the format of the template, as well as add certain variable fields to the template. This option is only recommended for users with intermediate knowledge of HTML.
- **New Word/PDF Template** opens up a wizard that allows you to create either a PDF or Microsoft Word template from the selected data. This wizard allows you to adjust the format of the template, or use an attached file field from the existing record or from a linked record as the document template.
- **Edit** and **Manage** both open up a window that showcases the document templates created using the two options above.