Standard Knowledgebase Guide

This guide describes the Standard System Demo setup of Agiloft's Standard Knowledgebase (KB). It divides the system into several large functional areas, and then describes the tables that are used in those functional areas. This guide is primarily intended for admin users or system designers who need structural information about the Standard Agiloft Knowledgebase for customization purposes.

The Agiloft Standard System Demo contains several modules that are pre-configured with Agiloft best practices and automation. Depending on the selections made when a KB was created, some of these modules may be fully or partially hidden.

The Standard Knowledgebase Guide contains the following sections, which are also accessible from the left pane.

- Overview - Introduction to the Standard Knowledgebase Guide, such as basic information about use cases and processes
- Power User Interface – Introduction to the Power User Interface
- Admin Setup Menu – Overview of the Setup menu options
- End User Interface – Introduction to the End User Interface
- Supplier Portal – Introduction to the Supplier Portal, which allows suppliers to interact with the system
- User Roles – Overview of managing user permissions and the default user roles
- Background Tables – Overview of background tables, which are used in multiple modules and store basic information about people, places, and organizations
- Global Process Tables – Overview of approvals, tasks, and time entries, which are used in multiple modules such as contract management and service desk
- Contract Management Tables – Overview of tables dedicated to managing the contract lifecycle, including e-signature and approval workflows
- Sourcing Event Management Tables – Overview of tables dedicated to creating, approving, and posting sourcing events including selection and contract creation
- Supplier Management Tables - Overview of tables dedicated to onboarding and approving new suppliers, and supplier performance management
- Matter Management Tables – Overview of the Matter Management function with details about the tables
- Service Desk Operation Tables – Overview of tables dedicated to service desk operations, which are used to create an internal or external helpdesk system
- Project Management Tables – Overview of tables dedicated to organizing projects and managing purchase orders
- Sales CRM Tables – Overview of tables dedicated to tracking and automating sales leads, opportunities, and quotes
- Documents Table – Overview of tables dedicated to holding records for published documents
- System Tables – Overview of tables dedicated to managing other automation and functions, such as the EUI Templates Table and Replacement Variables Table
- Artificial Intelligence Tables – Overview of tables that can be used with AI if AI has been enabled