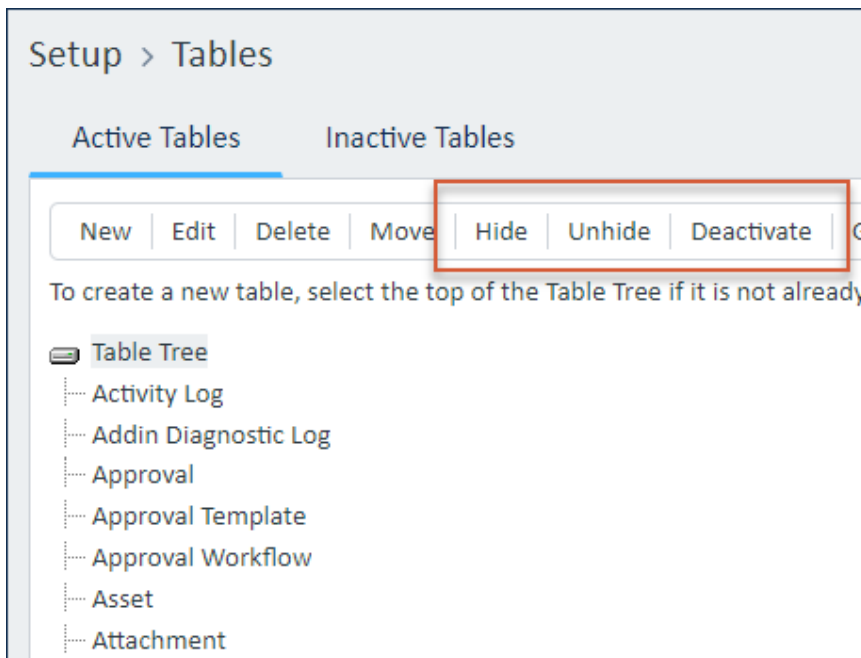


Hide or Deactivate Tables

Agiloft system tables can be hidden or deactivated, either to limit the number of active tables a user sees or remove tables from the default configuration that won't be used by your organization. To create a usable knowledgebase, it's best to only show relevant tables, so you may wish to hide some of the default tables in your implementation. It's usually not necessary to deactivate tables, unless you want to prevent users from performing certain actions, such as creating a record via a custom hotlink, viewing a table's reports, or selecting information from a linked field.



The Hide/Unhide and Deactivate functions correspond to the "Show table on the Toolbar?" and "Allow access to the table?" permissions in the Table Permissions wizard, respectively. Whereas the Table Permissions wizard enables you to configure table permissions for a given group, using Hide, Unhide, and Deactivate, toggles these permissions for all users.

Hide and Unhide Tables

A common scenario is to provide several user groups with access to a table, but not show that table in their navigation menu. By using the Hide function in the **Setup > Tables** screen, you can quickly remove the table from all groups' navigation menus. For groups that should see the table in their navigation menu, you can then individually adjust the "Show table on toolbar?" option for that group in the Table Permissions wizard.

Hiding a table does not affect the other record and field-level permissions for the table that a group has. This means they will still be able to view or edit records in the hidden table by accessing them through linked fields or related tables in other records.

Depending on your needs, you may want to hide or unhide tables from specific groups or all groups in the system.

Hiding Tables

To hide a table from a specific group:

1. Click the **Setup** gear in the top-right corner and go to **Access > Manage Groups**.
2. Edit the desired group.
3. Use one of the following methods:
 - a. Click the Tables tab:
 - i. Select the checkbox next to the table(s).
 - ii. Click Remove From Navigation Menu.
 - b. Click the Tables tab and edit the table:
 - i. On the General tab, choose No for the "Show table on toolbar?" option.
 - ii. Click Finish.

To hide a table from all groups:

1. Go to **Setup > Tables**.
2. Use one of the following methods:
 - a. Select the table in the tree and click Hide. Note that there is no visual indication that a table in the tree has been hidden from all groups.
 - b. Select the table in the tree and click Edit:
 - i. Go to the Permissions tab of the Table wizard.
 - ii. Select "Hide the table from all users."
 - iii. Click Finish to save the changes.

Unhiding Tables

To unhide a previously hidden table for a specific group:

1. Go to **Setup > Access** and click Manage Groups.
2. Edit the desired group.
3. Click the Tables tab and edit the table:
 - a. On the General tab, choose Yes for the "Show table on toolbar?" option.
 - b. Click Finish.

To unhide a previously hidden table for all groups:

1. Go to **Setup > Tables**.

2. Select the table in the tree and click Unhide. Note that there is no visual indication that a table in the tree has been unhidden from all users.

Deactivate Tables

Deactivating a table in the system removes access from all users, and it disables any additional functions of that table throughout the system. The Deactivate option is used to temporarily or permanently disable the table. Tables that are essential to system function do not offer the Deactivate option.

To deactivate a table:

1. Go to **Setup > Tables**.
2. Select the table in the tree and click Deactivate.

To activate a deactivated table:

1. Go to **Setup > Tables**.
2. Click the Inactive Tables tab.
3. Select the table in the tree and click Activate.

Effects of Deactivating a Table

A number of effects occur when a table is deactivated:

- A deactivated table is hidden from the system in table trees, wherever they appear.
- Rule actions linked to deactivated tables do not run their action, though the rule is not explicitly disabled.
- In other tables, linked fields that point to a deactivated table continue to appear in the Fields tab and Layout tab of the Table wizard, but:
 - Inactive linked fields cannot be edited.
 - Inactive linked fields are not displayed on the record form.
- In print templates, linked field variables that reference deactivated tables still appear in existing print templates, and they are included in the list of field variables when downloading the template from the Print Template wizard in other tables. However, only the label appears in the print template, not the value.
- Searches that reference the inactive table's fields do not function and cannot be edited.

Effects of Activating a Deactivated Table

After activating a previously deactivated table, prior functions and user permissions are restored throughout the system. For instance:

- Linked fields in other tables can be edited and viewed on the layout.
- Rules with linked actions to the previously deactivated table are now reactivated.
- Print templates can now reference linked field variables and show the appropriate values.
- Groups that had access to the table before it was deactivated now have access again.