

Accessing and Customizing the EUI

End users use an end user license and access a special interface called the End User Interface (EUI). All end users belong to an end user group, which is defined in the [Group Permissions](#) wizard, and end users in different groups may see different EUIs. For instance, external customers are part of one group that sees an external-facing EUI, while end users who are company employees see an internal-facing EUI. In either case, the end user license and EUI are designed for users who typically submit records or requests but do not work on them.

The default EUI covers a range of common uses, such as support applications, contract management, and document management. However, the EUI can also be highly customized depending on the needs of your users. You can:

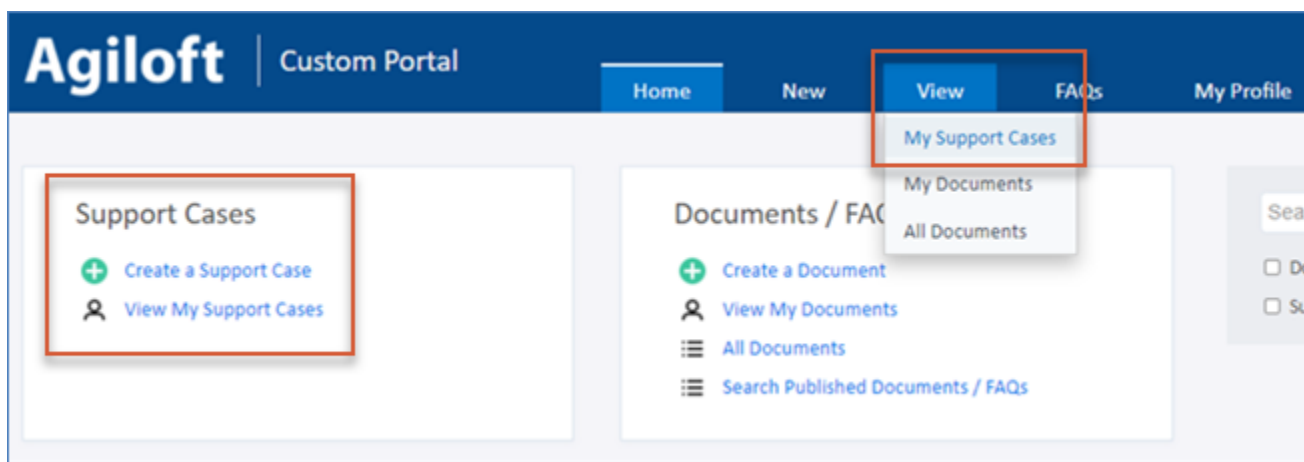
- Construct different screen layouts
- Provide your own style of toolbar
- Adjust the options on the main page
- Add your own fonts, color scheme, logo, and buttons using standard HTML and CSS
- Create a home page for each group, with customized navigation options

You can even direct power users to the EUI if you want to use a more customized interface for them.

Accessing the EUI

End users can access the EUI in several ways. For example, the standard knowledgebase login page offers an End User option for the interface. More commonly, end users access the system through a company web portal or a hotlink stored as a bookmark or sent by email. These methods automatically log the user in to the appropriate interface, without requiring the user to select the EUI option or manually enter login credentials.

When a user enters the EUI, the default setup shows tables and links based on the their group membership. For example, users in the Customer group see links to the Support Cases they've submitted, which can be accessed on the Home tab and the View drop-down menu.



Depending on their permissions and your setup, end users may also use the EUI to complete other tasks, such as the following:

- Search, view, and print FAQs
- Submit new items in any table
- Edit items defined as their own in any table
- View items in any table, as well as run and save simple and complex searches
- Edit their user profile

Directing Power Users to the EUI

The EUI offers extensive customization options that can be useful for power users as well. In that case, you might design a customized EUI specifically for power users, and you would need to direct power users to that interface automatically. You can automatically send power users to the EUI if necessary, through custom login pages or using [Single Sign-on \(SSO\)](#).

To use custom login pages, work with Support to compose hyperlinks that direct the user to one interface or the other. With this method, you can simply distribute the EUI link, Power User Interface link, or both to each user as appropriate.

To set the EUI as the default interface option with SSO, open the user record and set the Preferred Interface field to "EUI." The "Based on Permission" value points to the setting on the General tab of the user's group, where the group is configured as a Power User or End User group. Users with at least one Power User group are shown the Power User Interface unless their Preferred Interface is set to "EUI."

If you don't have the Preferred Interface field in your system:

1. Create a new Choice field in the People table.
2. Name it Preferred Interface.
3. Assign it a new choice list with the options "Based on Permission" and "EUI."
4. Set the default value to "Based on Permission."




If you need to test this method without setting up an SSO-friendly test user, you can use this hyperlink syntax to pass the EUI interface preference, replacing `KBName`, `login` and `password`, but make sure to encrypt the URL if you need to send it to an external party:

```
https://KBName.agiloft.com/gui2/login.jsp?keyID=0&kb=KBName&user=login&password=password&State=Main&gui=enduser&euiurl=/eui2template/main.php
```

Customizing the EUI

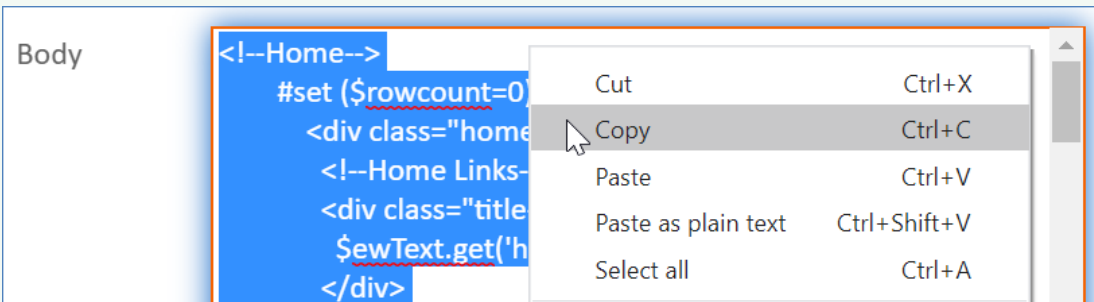
The EUI is customized by editing [EUI templates](#), which determine how different parts of the EUI look. For example, one template determines how the navigation menu looks and what options are included in the menu; another template determines the items in the search area. Not all templates stand alone, and some are used by other templates or included in other pages. For instance, the `header.htm`, `footer.htm`, and `menu.htm` templates are included in every page of the EUI.

 In addition to the HTML-based EUI that uses EUI templates, Agiloft offers a **Legacy EUI** with limited functionality.

Editing EUI Templates

All EUI templates are stored as records in the EUI Templates table, and editing the templates allows you to customize different parts of the EUI. However, before editing anything in the EUI, we strongly recommend that you have a basic understanding of CSS and HTML. [W3 Schools](#) is a helpful online resource for learning about those topics. Once you have a grasp of HTML and CSS, you'll find it easier to make changes to individual EUI templates. One you understand CSS in particular, you can make global formatting changes by editing the `style.css` template file.

- ✔ When you make changes to any record in the EUI Templates table, save a copy of the text so that you can revert the code back to its original state if necessary.



Copy the Body of the template into a note in case you need to revert your changes

For more information about how to customize some of the main EUI templates, see [Working with the Default EUI Templates](#). For general information about the EUI templates, see [EUI Template Reference](#).

Macros

When you're customizing the EUI, understanding how macros work is important. The main template for the home page is `main.php`, but this template doesn't directly contain the elements displayed on the home page. Instead, it uses the macro `#ew_include()` to pull in the contents of three other template records: `header.htm`, `home.htm`, and `footer.htm`. In turn, `header.htm` uses the same macro to include the template `menu.htm`, and `home.htm` includes `search-form.htm`. The `header.htm` file also uses macros to reference to the logo, plus user information and a logout link in the upper-right corner. For more information on macros, see [Macros, Methods, and Conditionals](#).