

Agiloft Upgrade in November

Agiloft underwent mandatory updates to navigation menus and the system's look and feel on November 12th. Changes are listed below.

**Note: these changes do not apply to the standard end user interface used by some in the contract creator role.*

New Features and Enhancements

- **Menu** – The *Main Navigation* is now located at the top of the screen instead of the left-hand navigation. Tables and groupings not located on the main menu at the top can be found on the main navigation icon (series of 9 dots at top left, also called a bento icon).
- **Search** – The enhanced Global search box in the middle of the top of the page now lets you use the drop down arrow to select a specific table for better results. The results will load on a new, easy to use search menu on the right side of the page.
- **Agiloft FAQ** – There is a new menu item in the top navigation menu called Agiloft FAQs which includes answers to common questions, training materials and reference guides.
- **Status Indicators** - Color coded blocks now reflect the status of contract records on contracts table views next to the contract IDs on the most commonly used views.
- **Color Scheme Updates** – The color scheme has been updated to a modernized look.
- **Contract Management Dashboard** – The new contract management action home page displays reflect what requires changes and what is in still progress.

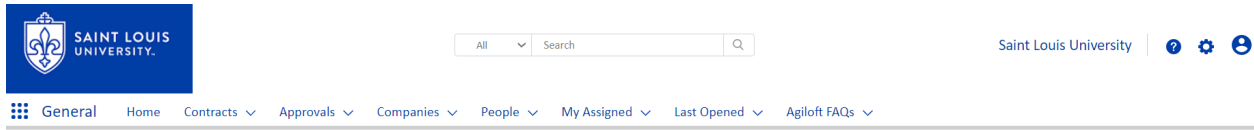
Agiloft Issues after Upgrade

While we do not anticipate any issues, if you experience any, please contact the following:

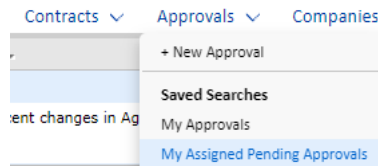
- University Contracting – agiloftsupport@slu.edu
- Research Contracting – contracts@slu.edu


Top Navigation Menu Quick Reference Guide (effective Nov 12th)

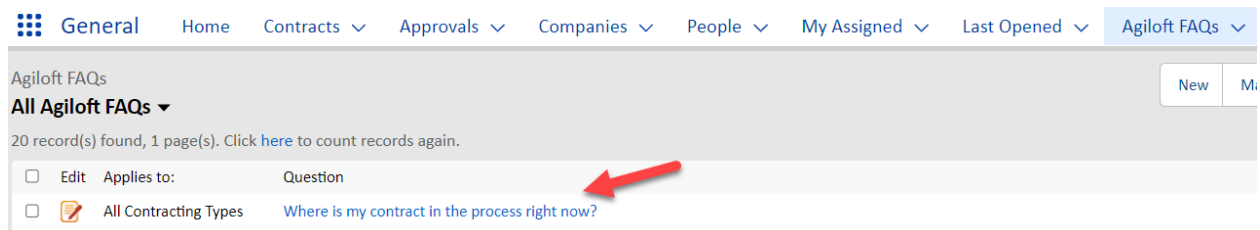
The main navigation menu is located on the top toolbar (previously left-hand side)



The top navigation menu includes the following. Click on the title to view the table, click on the caret \downarrow to view the saved searches under the menu item such as Approvals > My Assigned Pending Approvals.



- Bento (9 dots menu):  click this icon and then use VIEW ALL to browse a listing of all common tables such as **contract summaries**
- General (description of toolbar)
- Contracts: includes a listing of contracts you have access to view; click on the carat to view the saved searches such as My Assigned
- Approvals: shown for approval teams
- Companies: listing of company entries in Agiloft
- People: listing of people in Agiloft (external and internal contacts)
- My Assigned: contracts or approvals related to your role
- Last Opened: the last 5 records you opened
- Agiloft FAQs: shows a list of help topics categorized by University Contracting, Research Contracting, or All Contracting Types; includes Q&A, manuals, and guides. Click on the question to view answer and any related attachments.



In addition to the navigation menu, the top navigation includes a new search box that allows for filtering on specific tables (categories) for faster, better results. The search results open on the right-hand side of the page.

