

Groups and Teams

When you begin to customize the system, think about the different types of users and how their role affects the access they need.

AgiLoft users belong to *teams* and *groups*. Groups set the level of access to tables, records, and fields. Team settings affect other parts of the interface such as the color scheme, available table views, and the user's default home page. Teams also define working groups of users, and can receive emails that go to every member of the team.

Users in multiple groups receive the superset of those groups' access settings. Users can also belong to multiple teams, but must always have a Primary Team to set important defaults. Groups are time consuming to configure due to the sophistication of the permission options. For easier maintenance, we recommend keeping the number of groups as small as possible.

Terminology

A note about terminology: We use the term **end user** to mean users who access the system through the end user interface, a simplified interface that allows them to create records of any kind, view any records made available to them, edit records defined as their own, and view any FAQs made available to them. These users cannot edit records defined as belonging to other people and they use the unlimited end user license.

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 (typically their supervisor or supervisee).

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.

Both end users and power users may be employees of your company. Power users require their own named license or may share a concurrent power user license.

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