openCRX QuickStart

Version 2.2



www.opencrx.org

openCRX is the leading enterprise-class open source CRM suite. openCRX is based on openMDX, an open source MDA framework based on the OMG's model driven architecture (MDA) standards. This guarantees total openness, standards compliance, a state-of-the-art component-based architecture, and virtually unlimited scalability.

License

The contents of this file are subject to a BSD license (the "License"); you may not use this file except in compliance with the License. You may obtain a copy of the License at http://www.opencrx.org/license.htm

Copyright 2008 © CRIXP Corp. All rights reserved.

Table of Contents

1	About 1	this Book	4
	1.1	Who this book is for	4
	1.2	What do you need to understand this book	4
	1.3	Tips, Warnings, etc	4
2	Prerea	uisites	5
	2.1	Selection of Software Packages / Versions	5
	2.2	JDK 5.0	6
	2.3	Installing / Configuring Database	7
	2.4	Installing Apache Tomcat or JBoss Application Server	7
3	openCF	RX Setup and Configuration	8
	3.1	Overview	8
	3.2	Verify/Create Application Server Logins	8
	3.3	Initial Setup of openCRX Application	9
	3.3.1	First Login as "admin-Root"	10
	3.3.2	Create Data Segment "Standard"	12
	3.3.3	Import Codes and Data	13
	3.3.4	Set Access Levels of Codes	14
	3.3.5	Restarting the Application Server	15
	3.4	Initial Setup of Segment "Standard"	15
	3.4.1	First Login as "admin-Standard"	15
	3.4.2	Configure Segment "Standard"	17
	3.4.3	Create a new Contact "guest"	18
	3.4.4	Create a new User "guest"	19
4	Next St	teps	21
		-	

List of Figures

Figure 1: openCRX Login page	9
Figure 2: First login with admin-Root / rootSecret	10
Figure 3: Start screen of admin-Root	11
Figure 4: Create a new segment named Standard	12
Figure 5: Result of operation Create Administrator	12
Figure 6: Load Code Tables and Data – Step 1	13
Figure 7: Load Code Tables and Data – Step 2	13
Figure 8: Execute Operation Set Access Level	14
Figure 9: Parameters of Operation Set Access Level	14
Figure 10: Result of the Operation Set Access Level	14

Figure 11: First login with admin-Standard / adminSecret.	16
Figure 12: As admin-Standard start the wizard Segment S	etup17
Figure 13: Wizard Segment Setup - properly configured Se	egment17
Figure 14: Create new Contact – Step 1	
Figure 15: Create new Contact – Step 2	
Figure 16: Create new User	19
Figure 17: Result of operation Create User	20

List of Listings

Listing 1:	Console Output – JBoss startup	7
Listing 2:	File users.properties with syntax user=password	8
Listing 3:	File roles.properties with syntax user.Roles=role1,role2,	8
Listing 4:	Console Output – Initialization of the openCRX servlet	.11
Listing 5:	Console Output – Importing Codes and Data	.13

1 About this Book

This book describes what you need to get started with openCRX and how to configure openCRX. Please note that this is a guide on how to <u>manually</u> set up a **runtime environment**.

If you're looking for an <u>automated</u> installation method, please consider our openCRX Server Installer available from http://www.opencrx.org/server.htm.

1.1 Who this book is for

The intended audience are openCRX administrators and advanced users who plan to manually install the openCRX application.

1.2 What do you need to understand this book

This book describes how to install openCRX and how to configure openCRX. Even though it is possible to install openCRX without a deeper understanding of J2EE applications, application servers, and database management systems, it is still a plus if you are comfortable with these topics.

openCRX is an enterprise-class J2EE application. Installation, administration, and maintenance of such applications is somewhat more involved than running a simple *setup.exe* (or *make install*, for that matter). So please do not expect that you will manage to install openCRX in 10 minutes as even experienced administrators can easily spend an hour or more on their first manual install.

1.3 Tips, Warnings, etc.

We make use the following pictograms:



Information provided as a "Tip" might be helpful for various reasons: time savings, risk reduction, etc. - it goes without saying that we advise to follow our guides meticulously

> **meticulous** \muh-TIK-yuh-luhs\, *adjective*: Extremely or excessively careful about details.



You should carefully read information marked with "Important". Ignoring such information is typically not a good idea.



Warnings should not be ignored (risk of data loss, etc.)

2 Prerequisites

Installing openCRX is a somewhat involved process as you are required to install/configure various other components as well.



If you are not comfortable with setting up an application server, installing a database management system, building EARs, etc. you might want to have a look at the **openCRX Server Installer**. The installer will take care of all the installation tasks so that there is no need to work through this QuickStart guide.

Before you get started with the selection process, however, it is a good idea to spend some time browsing the various pages containing information about the products and reviewing the openCRX version compatibility information provided at http://www.opencrx.org/faq.htm#versioncompatibility.

2.1 Selection of Software Packages / Versions



In the end, you will have installed several software packages and it makes sense to write down the names and version numbers of these software packages – this information might be helpful in the future in case you require support or want to file a bug report:

Required Software	Information	Name	Version
openCRX CRM Suite	www.opencrx.org	openCRX	2.1.0
openMDX MDA Platform	www.openmdx.org	openMDX	2.1.0
Java 5 Platform Standard Edition	java.sun.com Oracle/BEA website	[] Sun J2SE JDK [] BEA JRockit JDK 	1.5
Java Build Tool	ant.apache.org	Ant	[] 1.7.0
Tomcat or Application Server see here for information about deploying openCRX on Tomcat	openCRX FAQ	[] Apache Tomcat [] JBoss 	6 4.2
Database Management System	openCRX FAQ	[] Oracle [] DB/2 [] MS SQL [] PostgreSQL [] MySQL [] HSQLDB 	

2.2 JDK 5.0

Install the Sun Java JDK 5.0 available from http://java.sun.com/javase/downloads/index_jdk5.jsp



You really need **Java 5**, i.e. neither Java 4 nor Java 6 will work.



It is not sufficient to have a Java Runtime Environment (JRE) only. The full-blown **JDK** is required to run openCRX.



Don't forget to set the **environment variable** JAVA_HOME



If you deploy openCRX on Sun's JVM you might run into a problem that is mind-boggling (but specific to the Sun JVM). It's the dreaded

PermGen OutOfMemoryError

While increasing the size of the PermGen space with the appropriate JVM option might postpone the problem it is not really a solution: -XX:MaxPermSize=400m

(400m means 400MB; if you have enough memory at hand you can also set it to a larger value)

Lots of people have been struggling with this error (which is by the way not related to openCRX – any application could trigger it) and as of today we have not come across a solution other than to avoid Sun's JVM (JVMs by Oracle/BEA and IBM are – by construction – not prone to this error). Do a Google search if you want to convince yourself or drop us a line if you have a solution. But be aware that increasing the memory allocated for the permanent generation is no solution – it will only postpone the problem:

- http://my.opera.com/karmazilla/blog/2007/03/13/good-riddance-permgen-outofmemoryerror
- http://my.opera.com/karmazilla/blog/2007/03/15/permgen-strikes-back
- http://crashingdaily.wordpress.com/2007/02/04/crashing-tomcat/

2.3 Installing / Configuring Database

As far as the **database** is concerned, the openCRX FAQ might give you some guidance in making your choice (please note that the openCRX distribution includes all the required configuration and deployment files for **PostgreSQL**, **HSQLDB**, **MySQL**, **MS SQL**, **IBM DB/2** and **Oracle**). Various openCRX installation guides for database management systems are available from http://www.opencrx.org/documents.htm.

The remainder of this document assumes that you decided for MySQL and hence – after following the **openCRX Installation Guide for MySQL** – you should have a working installation of the **MySQL** database before you continue with this guide.

2.4 Installing Apache Tomcat or JBoss Application Server

openCRX v2.2+ can be deployed on Apache Tomcat resulting not only in much reduced complexity without loss of functionality compared to the deployment on a full-blown application server, there is also a performance gain of at least a factor of 2. Additional information regarding the openCRX deployment matrix is available from http://www.opencrx.org/faq.htm#deploymentmatrix

In order to install **Apache Tomcat**, please use the **openCRX Server Installer**. While you could obviously do a manual installation of Tomcat, using the installer is both the easiest and the fastest way to end up with a working openCRX instance.

If you prefer to deploy openCRX on the JBoss application server, please refer to the **openCRX Installation Guide for JBoss**. The remainder of this document assumes that you decided for JBoss and hence you should have a working installation of the JBoss application server before you continue with this guide.

Obviously, if you ended up making different choices, you can still follow this guide. You might have to make some minor adjustments to the instructions given here and some of our screen shots might look somewhat different from what you will see on your screen.

Do NOT deploy any other openCRX EARs (e.g. groupware) in addition to opencrx-core-CRX.ear before having completed the setup based on this guide.

Assuming you have JBoss up and running, the last few lines of your console output should look similar to the following ones:

Listing 1: Console Output – JBoss startup

... 17:23:05,728 INFO [Http11AprProtocol] Starting Coyote HTTP/1.1 on http-0.0.0.0-8080 17:23:05,759 INFO [Server] JBoss (MX MicroKernel) [4.2.2.GA (build: CVSTag=Branch_4_2 date=200810162339)] Started in 32s:141ms

Now you are ready to continue.

Tin

3 openCRX Setup and Configuration

Once the database is ready and openCRX properly deploys on your application server there are still a few tasks left to set up and configure openCRX. This chapter guides you through these tasks on a step-by-step basis.

3.1 Overview

Let us give you a brief overview of the tasks ahead before we get started:

- Verify/Create Application Server Logins
- Initial Setup of openCRX Application
 - First Login as "admin-Root"
 - Create Data Segment "Standard"
 - Import Codes and Data
 - Set Access Levels of Codes
- Initial Setup of Segment "Standard"
 - First Login as "admin-Standard"
 - Configure Segment "Standard"
 - Create a new Contact "guest"
 - Create a new User "guest"

All right, let's get started.

{openCRX/AppServer Admin} {openCRX Admin} {openCRX Admin} {openCRX Admin} {openCRX Admin} {openCRX Admin} {Segment Admin} {Segment Admin} {Segment Admin} {Segment Admin}

3.2 Verify/Create Application Server Logins

For the following steps we assume that the openCRX administrator has configured the users *admin-Root*, *admin-Standard* and *guest* with the appropriate roles on the application server. In the case of JBoss this requires creating/editing the files **users.properties** and **roles.properties** as follows:

Listing 2: File **users.properties** with syntax user=password

admin-Root=rootSecret admin-Standard=adminSecret guest=guest



```
admin-Root.Roles=OpenCrxRoot
admin-Standard.Roles=OpenCrxAdministrator
guest.Roles=OpenCrxUser
```



It is strongly recommended that you stay with the file-based UsersRolesLoginModule for the user **admin-Root**. This greatly simplifies the openCRX bootstrapping

3.3 Initial Setup of openCRX Application

Connect to the login page of openCRX. The exact URL depends on your deployment details. For a standard openCRX deployment to JBoss running on your local machine and listening at port 8080 the URL is

http://localhost:8080/opencrx-core-CRX/Login

You should see the openCRX Login page as follows:

🧐 openCRX - Login - Mozilla Firefox 📃				
<u>File E</u> dit <u>V</u> iew Hi <u>s</u> tory <u>B</u> ookmarks	<u>T</u> ools <u>H</u> elp	Google	\sim	
🔇 🔊 - C 🗙 🏠 🗋 http://c	calhost:8080/open	crx-core-CRX/Login.jsp	→ -	
🧿 openCRX - Login	×		•	
openCRX v2.1.0 (CRX) - Chang	ge login-header.h	tml in order to customize this head	er	
Copencrx				
Login		en_US - English (United States) $^{\bigtriangledown}$		
Username: Password:		Login		
Change login-note.html in orde	er to customize this	note		
openCRX v2.1.0 (CRX) - Char	ige <mark>login-footer.h</mark>	tml in order to customize this foote	r	
Done			¥ .:	

Figure 1: openCRX Login page

3.3.1 First Login as "admin-Root"

Enter **admin-Root** into the field *Username* and then enter **rootSecret** into the field *Password* (you may have chosen a different password, i.e. enter the password you chose during installation/configuration of the application server):

🤒 openCRX - Login - Mozilla Firefox 📃							
<u>File</u>	t <u>V</u> iew Hi	<u>s</u> tory	<u>B</u> ookmarks	<u>T</u> ools	<u>H</u> elp	Google	ب 🔎
< > ·	G×	☆ (http://o	calhost:	8080/op	encrx-core-CRX/Login.jsp	→ -
🧿 oper	nCRX - Logir	1		×			•
	openCRX	v2.1.0 (CRX) - Chang	e login-	header	.html in order to customize this	s header
C	open	crx					
	Login					en_US - English (United State	25)
	Username: Password:	ad	min-Root			Login	
	Change logi	n-note	e <mark>.html</mark> in orde	er to cust	tomize th	is note	
	openCRX	v2.1.0	(CRX) - Chan	ige logir	n-footer	.html in order to customize this	s footer
Done							* .:

Figure 2: First login with admin-Root / rootSecret

Click the button **Login** to start the initialization process.



If you can't get past the login screen (with the correct Username and Password, of course) and the Warning "Browser must accept cookies" keeps showing up need to **verify your browser settings related to cookies**. If you have installed a **personal firewall** (e.g. ZoneAlarm, Comodo, etc.) you also need to verify the cookie settings of your firewall. The application server must be able to create/set a session cookie.

The openCRX servlet is initialized during this first login, i.e. don't kill the browser if it takes a while. The application console output will look similar to the following listing:

Listing 4: Console Output – Initialization of the openCRX servlet

10:09:48,756 INFO [STDOUT] Wed Dec 13 10:09:48 CET 2006: Login: requestURL=http://localhost:8080/opencrxcore-10:10:23,026 INFO [STDOUT] Inspecting /WEB-INF/config/filters



If you see lots of error messages on the console and/or your log files grow very fast (several hundred KB if not more) then it is quite likely that your **DB connection** is not configured correctly. If your log file contains errors like **MEDIA_ACCESS_FAILURE** there is definitely something wrong with your DB connection (or your DB). Please note that there is absolutely no sense in continuing before you have fixed your DB connection. You might want to verify

- the spelling of the name of your DB (e.g. crx-CRX vs. CRX_CRX)
- user name (e.g. system) and password (e.g. manager)
- permissions of the user, etc.

After the successful startup of the openCRX servlet you see a screen similar to the one shown in the figure below. You should at least see the root objects Administration, Codes, Security Realm, Security Policies, and Security Subjects:

🖲 openCRX - Admin	stration - Administration - Mozilla Firefox 3 Beta 3	כ
<u>File E</u> dit <u>V</u> iew Hi <u>s</u> t	ory Bookmarks Tools Help G G G Google	
🔄 🔶 · 🕲 🕃	☆ C http://localhost:8080/opencrx-core-CRX/ObjectInspectorServlet?requestId=f21	3
🧿 openCRX - Admin	stration - Admi 🔯	[
Copencrx	admin-Root •• us • Logoff admin-Root@Root I) • Save Settings	
	 Administration Administration 	x
Administration	Edit View Actions Witzerds	
Security Realm Security Policies Security Subjects History	H Nem - Decembros -	(1-0)
one		0

Figure 3: Start screen of admin-Root

3.3.2 Create Data Segment "Standard"

Execute the operation Actions > Create Administrator to create a new segment and selected default accounts (including an administrator's account which allows you to manage the newly created segment).

Set the field <u>Segment name</u> to **Standard**. Leave the field <u>Admin principal</u> <u>name</u> empty and set the fields <u>Initial password</u> and <u>Password again</u> to **opencrx** as shown in the figure below:

Create Administrator		×
Input		
Segment name:	Standard	
Admin principal name:		
Initial password:	•••••	
Password again:	•••••	
		OKCancel

Figure 4: Create a new segment named Standard



Please verify the spelling of the segment name: **Standard** (with a capital "S").

Next you click OK to execute the operation Create Administrator which creates the segment named **Standard** and user **admin-Standard**. The result of executing this operation should look as follows (Status 0 indicates that there were no errors):

Status:	0
Status message:	

Figure 5: Result of operation Create Administrator

3.3.3 Import Codes and Data

openCRX is distributed with many code tables and several data files (e.g. unit of measurement information, standard activity management process). Code tables and data files must be imported from the provided XML files to make them available to openCRX.

Execute the operation View > Reload and then click Yes to start the import:

🗝 Administration			Х
Edit	View	Actions Wizards	
Stat	Reload		
Stat	us mes	ssage:	

Figure 6: Load Code Tables and Data – Step 1

	🗝 Administration	
	Edit View Actions VVizards	
Are you sure you	want to execute this operation?	×
:		
-		
	Yes No	

Figure 7: Load Code Tables and Data – Step 2

Please note that this operation takes some time to complete as thousands of objects are made persistent in your database during the import. The console output will look similar to the following listing:

Listing 5: Console Output – Importing Codes and Data

/accesslevel.xml
/accountcategory.xml
/accountrole.xml
/accesslevel.xml
/accountcategory.xml
/accountrole.xml
/usageproductbaseprice.xml
/utcoffset.xml
ug-and-foaturo-progoss yml
ug-and-reacure-process.xmr
ontracts.xml
roducts.xml
I and Paper yml

3.3.4 Set Access Levels of Codes

Navigate to the package Codes by clicking on the Root menu entry Codes. Then execute the operation Security > Set Access Level as shown below:

Edit View Security		Х
Edit View	Security	
Codes ^	Set Owning User Add Owning Group Remove Owning Group Remove All Owning Groups Set Access Level	
₩ • •	New Edit View	(1-16)

Figure 8: Execute Operation Set Access Level

Set the parameters as follows (see also figure below):

Bi Uj Di M	rowse access lev pdate access lev elete access leve ode:	el: [4] global el: [2] basic el: [2] basic [1] recursive	
0	🗄 Codes		Х
	Set Access Level	×	
	Input Browse access level: Update access level: Delete access level: Mode:	 [4] global (all users) ▼ [2] basic (group members ▼ [2] basic (group members ▼ [1] recursive ▼ 	116)
		OK Cancel	.:

Figure 9: Parameters of Operation Set Access Level

Please note that this operation can also take a fair amount of time to complete:

Codes
Codes
Codes
K
Edit View Security
Status message: {setAccessLevel=1574}

Figure 10: Result of the Operation Set Access Level

3.3.5 Restarting the Application Server

Please restart the application server for the newly imported codes to become active. You can stop JBoss by typing <CTRL>-C into the command window.



After stopping JBoss and before restarting JBoss it is strongly advised that you delete the **tmp** and **work** directories:

jboss-4.2.1.GA\server\default**tmp**

jboss-4.2.1.GA\server\default**work**

On Windows you can start JBoss by executing run.bat located in the directory jboss-4.2.1.GA\bin (on Linux you execute run.sh).

3.4 Initial Setup of Segment "Standard"

Once your application server is up and running again and openCRX properly deployed, we configure the new segment and create a new user.

3.4.1 First Login as "admin-Standard"

Connect to the login page of openCRX. The exact URL depends on your deployment details. For a standard openCRX deployment to JBoss running on your local machine and listening at port 8080 the URL is

http://localhost:8080/opencrx-core-CRX/Login

You should see the openCRX Login page as follows. Enter **admin-Standard** into the field *Username* and then enter **adminSecret** into the field *Password* (you may have chosen a different password, i.e. enter the password you chose during installation/configuration of the application server):

🕲 openCRX - Login - Mozilla Firefox	_ 🗆 🔀		
<u>File E</u> dit <u>V</u> iew Hi <u>s</u> tory <u>B</u> ookmarks <u>T</u> ools <u>H</u> elp <u>G</u> Google	<u>ب</u>		
🕢 🗸 C 🗙 🏠 📄 http:/localhost:8080/opencrx-core-CRX/Login.jsp	→ •		
🤅 openCRX - Login 🛛 🛛	•		
© openCRX - Login Image: CopenCRX v2.1.0 (CRX) - Change login-header.html in order to customize this header © openCRX v2.1.0 (CRX) - Change login-header.html in order to customize this header			
Copencrx			
Login en_US - English (United	States) [¬]		
Username: admin-Standard Password: •••••••••			
Login Nernam: admin-Standard Password: Image: Imag			
openCRX v2.1.0 (CRX) - Change login-footer.html in order to customiz	e this footer		
Done	*		

Figure 11: First login with admin-Standard / adminSecret

Click the button **Login** to start the login process.

The openCRX servlet is initialized during this first login after restarting JBoss, i.e. don't kill the browser if it takes a while.



Please note that no charts are displayed when a users logs in for the first time. Activate charts by executing the operation View > Recalculate and Refresh.

3.4.2 Configure Segment "Standard"

Once the admin-Standard's homepage is displayed, start the wizard Segment Setup. Select the menu Wizards > Segment Setup as shown below: User Homepages > admin-Standard,

🚮 admin-Standard, - My Homepage	Х	^
File Edit Find View Actions Security Wizards General Charts Options System * Timeline Timeline	الله لح	
Contact: admin-Standard,		≡

Figure 12: As admin-Standard start the wizard Segment Setup

This wizard verifies all the default objects of a segment. Running it on a newly created segments results in a lot of red crosses. Click on the button [Setup] and the wizard will create all the missing objects. You should end up with green check marks as shown in the following figure:

		Activity Filters	
Activity Creators		Phone Calls Meetings	>
E-Mails		New Activities	V
Tasks		Open Activities	V
Meetings	V	Export Profiles	
Phone Calls	V		_
Public E-Mails	V	Contract List (Excel)	
Public Tasks		Contract List with Positions (Excel)	
Public Meetings		Activity List with Follow-Line (Excel)	
Public Phone Calls		Account Member List (Excel)	
Workflows and Topics		Account List (Excel)	2
Topics		Report Templates	
Account Modifications	V	Contract Report Template	V
Activity Follow Up Modifications	V	Contract with Positions Report Template	V
Activity Modifications	N	Activity Report Template	
Alert Modifications		Activity With Follow-Ups Report Template	
Compatitor Medifications		Account Members Report Template	
Competitor Modifications Compound Booking Modifications		Account Members Report Template	
Competitor Modifications Compound Booking Modifications Invoice Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications		Account Members Report Template Account Report Template Setup Cancel	N N
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications Workflows		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications Workflows org.opencrx.mail.workflow.ExportMailWorkflow		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications Workflows org.opencrx.mail.workflow.ExportMailWorkflow org.opencrx.kernel.workflow.PrintConsole		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications Workflows org.opencrx.mail.workflow.ExportMailWorkflow org.opencrx.kernel.workflow.PrintConsole org.opencrx.kernel.workflow.SendAlert		Account Members Report Template Account Report Template Setup Cancel	
Competitor Modifications Competitor Modifications Compound Booking Modifications Invoice Modifications Lead Modifications Opportunity Modifications Organization Modifications Product Modifications Quote Modifications SalesOrder Modifications Workflows org.opencrx.mail.workflow.ExportMailWorkflow org.opencrx.kernel.workflow.PrintConsole org.opencrx.kernel.workflow.SendAlert org.opencrx.mail.workflow.SendAlert		Account Members Report Template Account Report Template Setup Cancel	

Figure 13: Wizard Segment Setup - properly configured Segment

Click on the button [Cancel] to return to the homepage of admin-Standard.

3.4.3 Create a new Contact "guest"

Click on the package Accounts in the root menu and then select the creator menu New > Contact as shown in the figure below:

	Accounts	
Q	and Accounts	X
My Homenage	File Edit View Actions Security Wilzards Reports	<u>H</u>
Accounts		
Activities	Accounts Account Groups Competitors Organizations » ^	
📧 Pipeline	Hef +(+ > >> P. New Edit View	(1-4)
Products	Full name - Allas name - Contact	a - Description -
Depots	Si Legal Entit	
Documents	admin-Standard, 76 Unspecified Account	
📜 Buildings	BC Group	
Forecasts		
🐱 UOMs		

Figure 14: Create new Contact – Step 1

This brings up the form for new contacts. Enter **guest** into the field *Last name* (feel free to provide additional information, but don't change the Qualifier, which is generated automatically by openCRX, unless you know exactly what you are doing):

Untitled - Contact

General Details Account	System *		
Person Salutation code:	N/A	Picture:	Browse
Salutation:			
First Name:			
Middle Name:			
Last Name:	guest		
Suffix:			
Nick Name:			
Alias name:			
Contact information	b1/A	(a.c.) No sectol stalls	
Freiened metriod.	N/A	No postal mail.	
Spoken language:	N/A	No bulk postal mail	
Written language:	N/A	Do not phone:	
No E-Mail:		Do not fax:	
Job Title:		Organization:	
Job Role:		Department:	
Gualifier: (must be unique, Le. leave Jg.rMEkIEd2qt6H86xPNp/	unchanged unless you know what you a A	e doing)	



Figure 15: Create new Contact – Step 2

Next you click Save to store this new Contact. This will take you back to the Account grid.

3.4.4 Create a new User "guest"

Click on the package User Homepages and select the operation Actions > Create User... which allows you to create and initialize a new user. Set the fields to the values as shown below – type **guest** into the field <u>Principal name</u>, use the Lookup Inspector or the autocompleter to fetch values for *Contact* and *Primary user group* (note that you must either fetch values with the Lookup Inspector or select entries from the autocompleter's drop down menu for the parameters *Contact* and *Primary user group*, i.e. it is not sufficient to just type some text into these fields), and then type a password (e.g. **guest**) into the fields *Initial password* and *Password again*:

🕑 openCRX - User Homepa	ges - User Homepa	ges - Mozilla Firefox 3 Beta	a 3	_ 🗆 🗙
<u>File Edit View History B</u> a	ookmarks <u>T</u> ools <u>H</u> el	p Google		۵ (
<rp></rp>	http://localhost:8080	/opencrx-core-CRX/ObjectInspect	torServlet?reques	tId=838 숬 ㆍ
🧿 openCRX - User Homepa	ges - Us 🔯			•
Copencrx	admin-Standard admin-Standard@Standard	en_US → □ →	Logoff Save Settings	
« ش My Homepage	User Homepages User Homepag Greate User	es	×	X
Accounts Activities Pipeline	Principal name: Contact: Primary user group:	guest 9. guest, [guest,] 9. Users [Users]	Q Q	(1-4)
Depots	Initial password: Password again:	·····		Store settings on
Euidings		ок	Cancel D80	
http://localhost:8080/opencrx-cor	e-CRX/ObjectInspectorS	Gervlet?requestId=838979f0-e7a4	+11dc-b2ab-8bffe	ac66 🔘 🤃

Figure 16: Create new User



Passwords are stored in the table **security_Credential**. If you do not have the login module of your application server configured to access the table security_Credential then the setting of the passwords in openCRX has no effect (with JBoss, for example, you can edit the files **users.properties** and **roles.properties** to add users with file-based authentication).

Next you click [OK] to execute the operation Create User which creates the User named **guest**. The result of executing this operation should look as follows (Status 0 indicates that there were no errors):

😉 openCRX - User Homepages - User Homepages - Mozilla Firefox 3 Beta 3 📃 🗖	×			
File Edit View History Bookmarks Tools Help Google	0			
👍 🗼 🔹 🙋 🔝 🟡 🤅 http://localhost:8080/opencry-core-CRX/ObjectInspectorServ/et2reguestId=838 😒	Ŧ			
	_			
🥲 openCRX - User Homepages - Us 🔝	•			
	\$			
admin-Standard en_US ~ Logoff admin-Standard@Standard □ ~ Save Settings				
User Homepages				
🛛 🔍 🚮 User Homepages 🛛 🗴	Ê			
Edit View Actions Security				
My Homepage				
Mu Accounts Status: 0				
Resize Created UserHome guest, [Edit]	Created UserHome guest, [Edit]			
Products	=			
A Depots				
Documents				
Buildings Mi (()) Q View (1-3)				
Forecasts Contact - Primary User Group - E-mail subject prefix - Web access URL - Store settings on				
UOMs admin-	-			
UOMs (Root) Standard, Administrators [CRX.Standard]				
Codes guest, Users [CRX:Standard]	~			
😼 Workflows				
Done	.:			

Figure 17: Result of operation Create User

The grid User Homes contains now 2 entries: admin-Standard and guest.

Congratulations! You have successfully created the new user guest. The new user should now be able to login. You can verify this by logging off and then logging on with *Username* **guest** and *Password* **guest**.



You can usually fix corrupt data of an existing user by creating this user's homepage again – note, however, that the respective user's personal settings are reset to default values by executing the operation Create User.

4 Next Steps

Now that you have successfully installed and configured openCRX you might want to have a look at some of the additional documentation published at http://www.opencrx.org/documents.htm.