



# Getting Started in WorkXpress



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# Chapter 1

## Creating Items and Fields

### In This Chapter:

- Learn about the five building blocks of WorkXpress.
- Learn how to create items.
- Learn how to add fields to items.

Welcome to WorkXpress! In this chapter, we'll walk through the basics of getting started in our powerful platform. We'll create a new application and get acquainted with what is included in a new application. Also, we'll teach you how to create your first item type, and see what building blocks WorkXpress automatically generates to accompany every item type you create. Next, we'll add fields to store data associated with the item. By the end of this chapter, you'll be able to create a functional WorkXpress application to track whatever people, places, and things are important to you.

### Helpful Links:

#### WorkXpress Application Customization and Technical Manual:

<http://www.workxpress.com/training/technical-manual>

#### Systems Administration:

<http://www.workxpress.com/training/systems-and-administration-training>

#### Online Forums:

<http://www.workxpress.com/forum>

### Contacts:

#### E-mail:

[support@workxpress.com](mailto:support@workxpress.com)

#### Phone:

1.717.609.0029

## Tom Needs to Track Accounts

In our example of how to begin in WorkXpress, we use a fictitious character, Tom, and his needs for a basic business application.







**Tom said,** *“I would like an application to track accounts. For each account, I want to know its name, address, website, telephone number, and a short description. I want to be able to classify my accounts by type: customers, vendors, partners or other.”*

*“Also, I would like a landing page for all users...a main menu. From the main menu, I need to be able to search my accounts, or add a new account. From the Account search page, I need to be able to view individual accounts.”*

# How Tom's Need is Translated into WorkXpress Terms

## Lesson #1: The Five Building Blocks

All WorkXpress applications are built from **five (5)** fundamental building blocks. You must answer these five questions to design an application:

 <b>Items</b> - What people, places and things do we want to track?	 <b>Fields</b> - What types of data do we want to accumulate about our Items?	 <b>Layouts</b> - What sorts of pages or interfaces are required?
 <b>Relationships</b> - How are my Items interconnected?	 <b>Actions</b> - What do we want the computer to do for us automatically?	

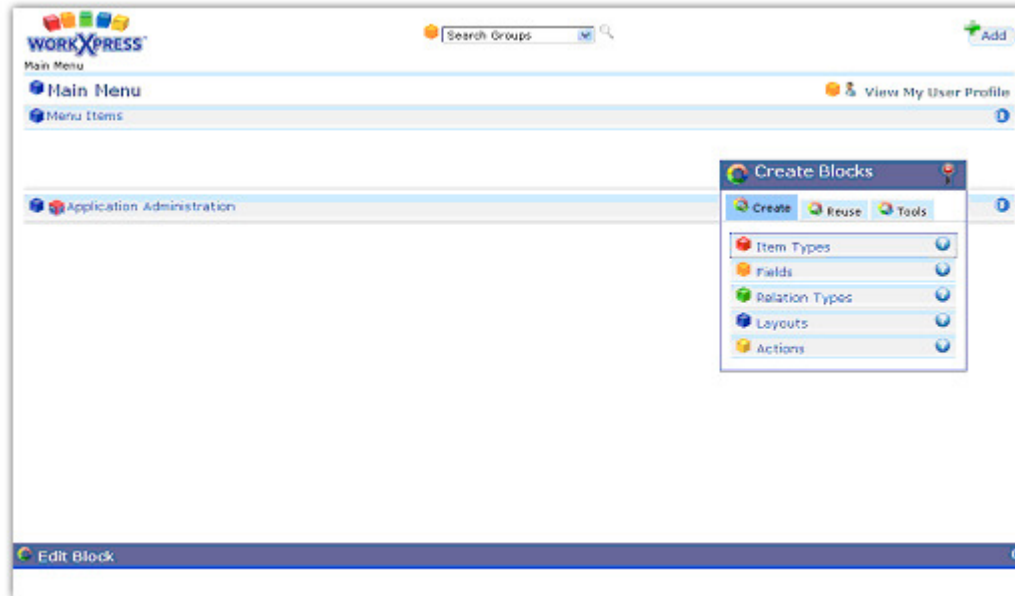
Let's identify the building blocks from Tom's description. Each colored word below corresponds to the same color building block above.

*Tom said, "I would like an application to track **accounts**. For each account, I want to know its **name**, **address**, **website**, **telephone number**, and a **short description**. I want to be able to classify my accounts by **type**: customers, vendors, partners or other."*

*"Also, I would like a landing page for all users...**a main menu**. From the main menu, I need to be able to **search my accounts** or **add a new account**. From the Account search page, I need to be able to view individual accounts."*

## Lesson #2: Starting Structure of a WorkXpress Application

When creating a new application, some basic structure is created for you automatically. You will start on a “Main Menu” which is a  page that you can later populate with additional  layouts and  links.




The **links** you put on the **main menu** will allow you to navigate to other areas of your application. You will also have tools to manage users, groups, reports and other basic functionality.

## WorkXpressions Based on Tom's Need

WorkXpressions are the actual building blocks required to implement the customer's need. In this case, the WorkXpression translates directly from the customer statement.

We translate Tom's quote to mean that the customer needs an  **item type** called 'Account'.

On the account, he needs a  **short text field** labeled 'Name', an  **address field** labeled 'Address', a  **URL field** labeled 'Website', a  **phone number field** labeled 'Telephone Number', a  **long text field** labeled 'Description', and also a  **select one field** labeled 'Type' which has the choices of 'Customers', 'Vendors', 'Partners' or 'Other'.

In addition, the customer needs a  **page** with a  **menu layout** for the Main Menu. The customer also needs a  **page** with a  **field grid** to add or view accounts, a  **page** with a  **list layout** to search accounts, and  **link fields** to add, view, and search the accounts.

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## Circle and Line Diagram

We commonly use a circle and line diagram to visualize the ways item types are interrelated.

Since this initial requirement is simple, so is the circle and line diagram.



## WorkXpress Objects Based on Tom's Need

Because all WorkXpress applications are just a combination of building blocks, it may be helpful to list out all of the building blocks in your application.

### Items

#### Accounts

### Relationships

- None

### Fields

- Name (Short Text::Accounts) \*\*
- Address (Address::Accounts)
- Website (URL::Accounts)
- Phone Number (Phone Number::Accounts)
- Description (Long Text::Accounts)
- Type (Single Select::Accounts)
- Add Account (Link::Accounts) \*\*
- Search Accounts (Link::Accounts) \*\*
- View Account (Link::Accounts) \*\*

### Layouts

- Main Menu (Page::Application) \*
  - Application Administration (Menu) \*
- Add Accounts (Page::Accounts) \*\*
  - Account Info (Field Grid) \*\*
- Search Accounts (Page::Accounts) \*\*
  - Search Accounts (List) \*\*

### Actions

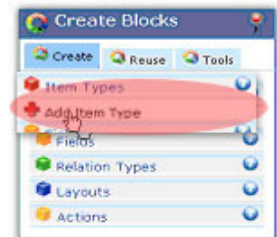
- None

\* Created automatically when your WorkXpress application is created (see lesson 2).

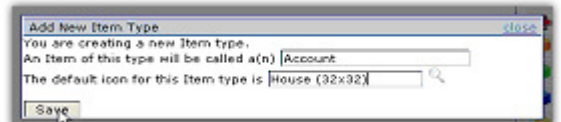
\*\* Created automatically when the item type is created (see lesson 3).

### Lesson #3: Item Type Creation and Automatically created Blocks

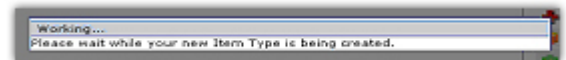
When you add a new Item Type...



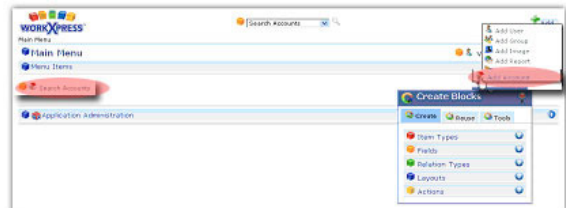
You will answer a couple simple questions...



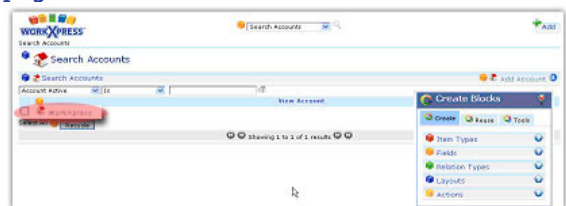
The system will create some things for you automatically...



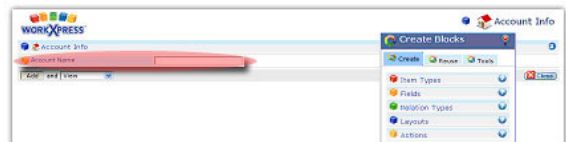
The system will create a **Search link** and an **Add Link** and put them on your **main menu**. Click the **search link** to go to the **search page**, or the **add link** to go to the **add page**.



It creates a **Page** with a **Search List** automatically. Click a **view item link** to go to its **view page**.



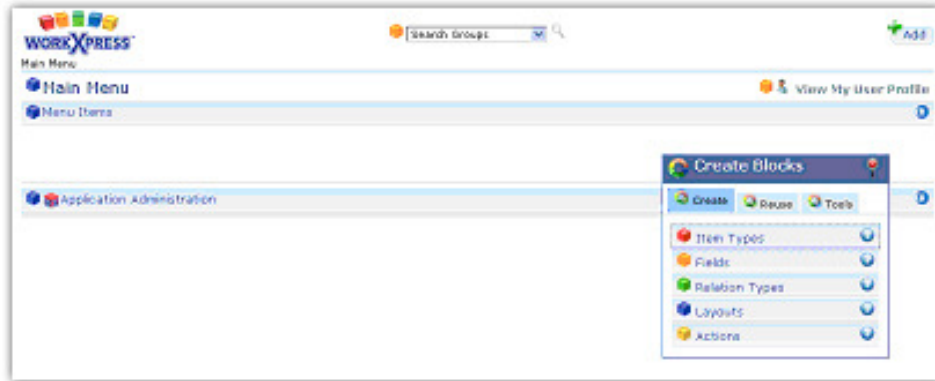
And finally it will create a **page** with a **field grid** for adding, editing and viewing. It will create the **Name** field and place it in the field grid.



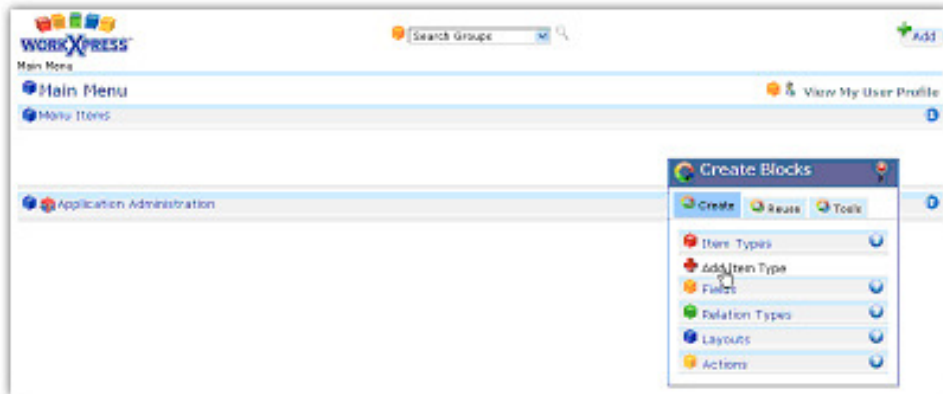


## Chapter 1 Walkthrough: Building Tom's Application

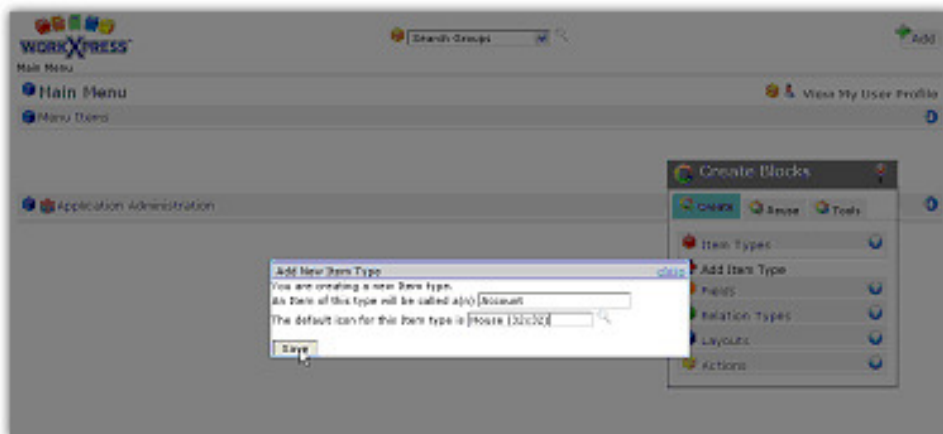
**Step 1:** Navigate to the main menu by clicking the logo in the upper left corner.



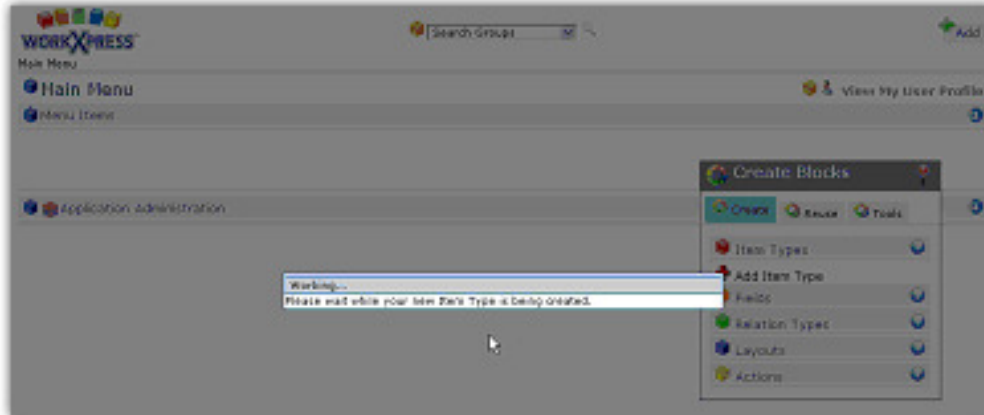
**Step 2:** On the Create Blocks tool, click "Item Types," then "Add Item Type."



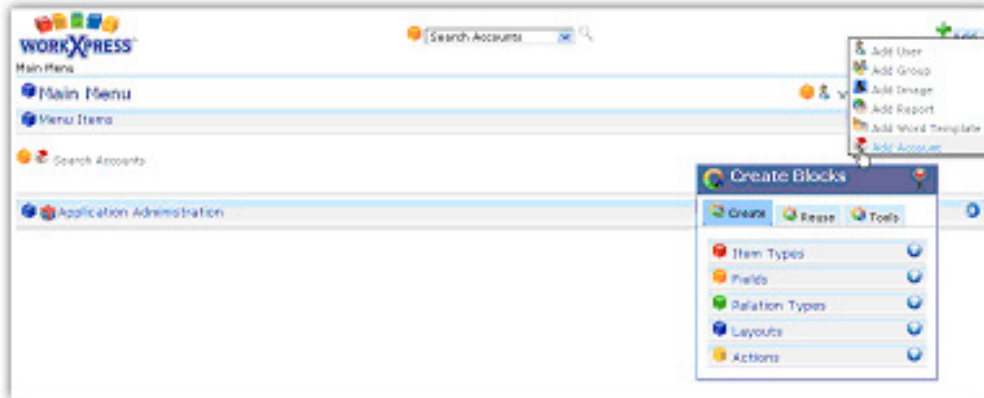
**Step 3:** Answer the questions by providing the singular name of the Item Type and choosing an icon (click the spyglass to launch a page where you can search all icons). Click "Save."



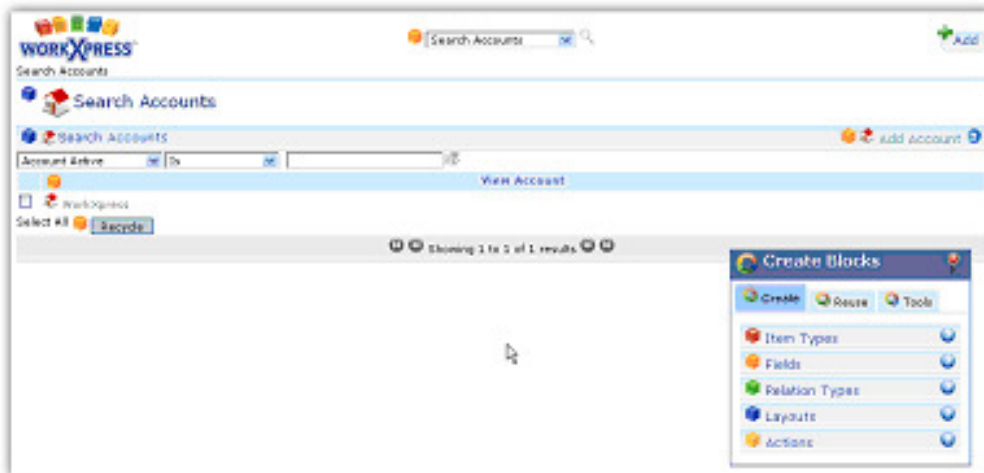
The wizard automatically creates some blocks for you (See Lesson 3).



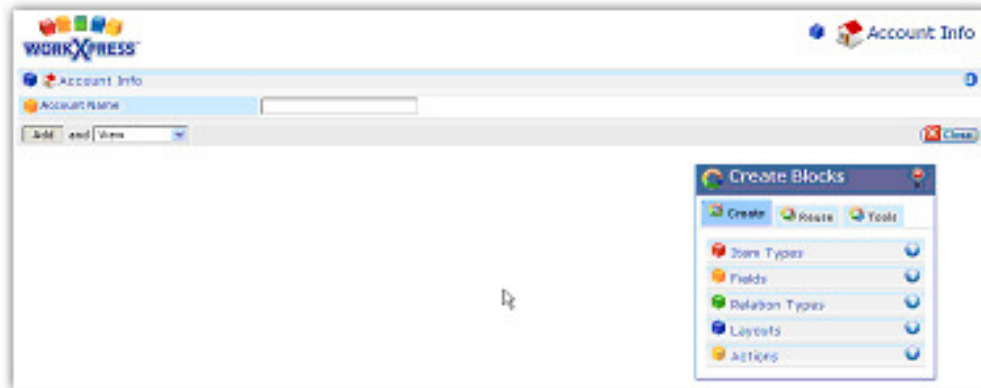
**Step 4:** Review your application so far. Notice the Add and Search links that were created for you.



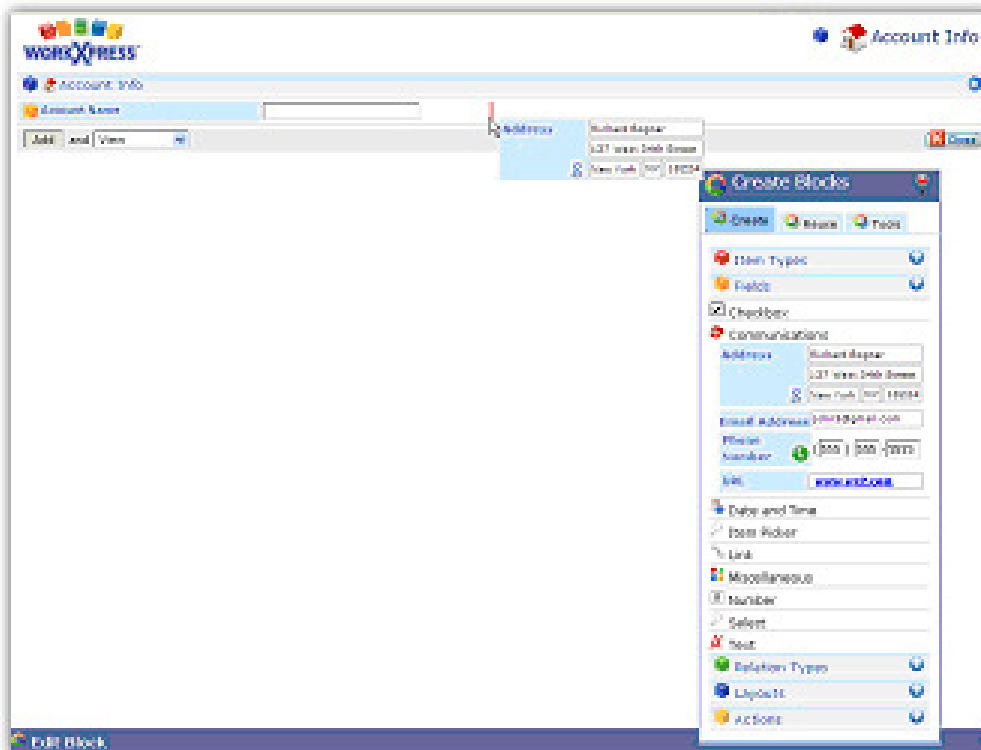
Also notice the search page created for you.



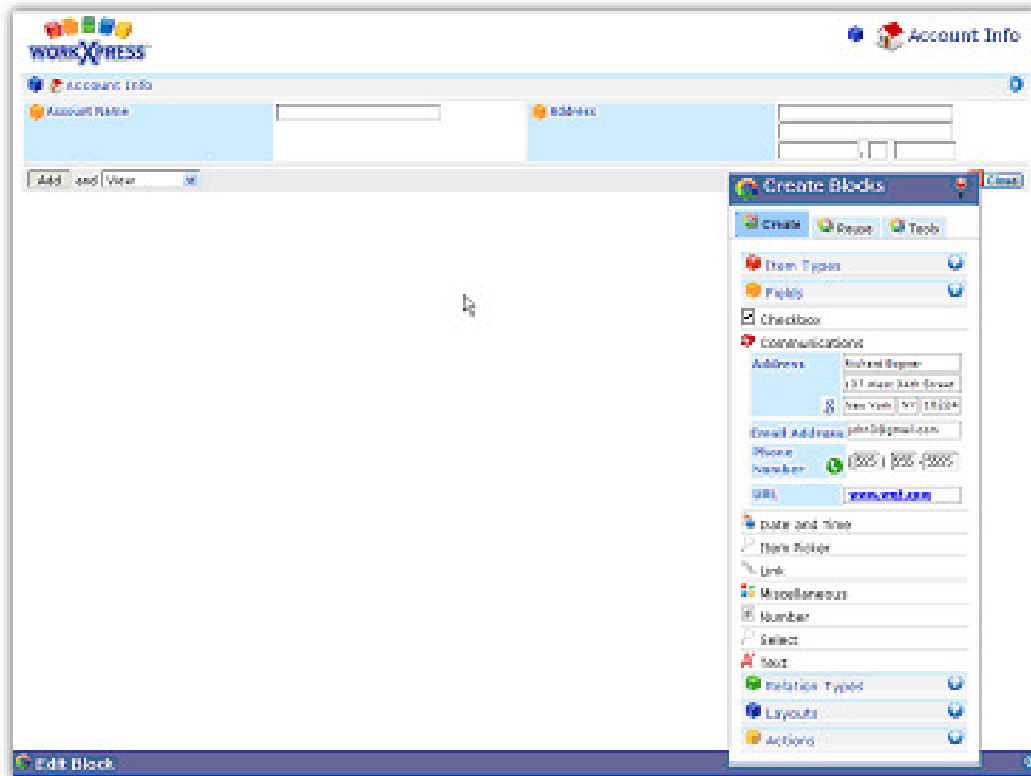
**Step 5:** Choose to “Add an Account” by clicking on the Add Account Link on your Main Menu



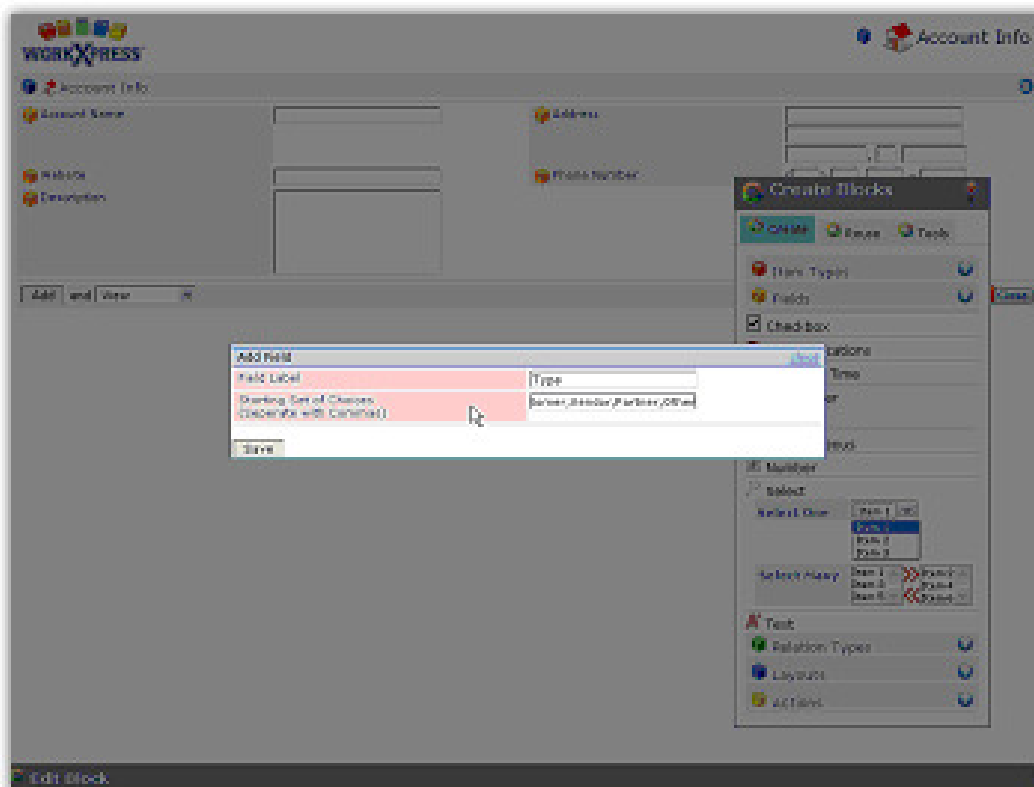
**Step 6:** Use the Create Blocks Tool to choose a field type (in this case, we’ll choose Address, which is under the Communications subheading), then click and drag it into your Field Grid. Drag the field onto one of the orange drop points that appear in the field grid. When the drop point turns red, drop the field. Answer the question(s) asked by the wizard and click Save.



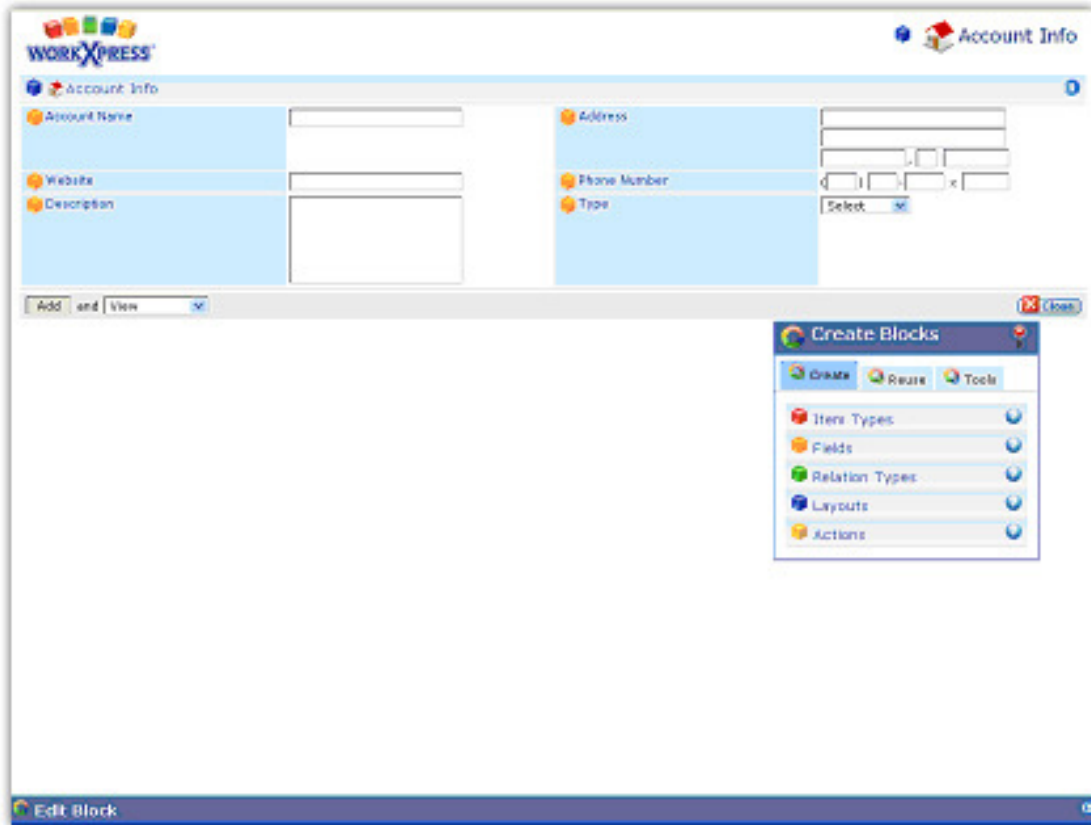
Your first field has been created!



**Step 7:** Drag and drop other fields. When adding most fields, you will just be asked for the field label. Notice, however, that when creating a Select One field, you must specify the select field's options.



Completed!



## Chapter 2

# Relating Items

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### In This Chapter:

- ❖ Learn how to create relationship types.
  - ❖ Learn how to create lists.
  - ❖ Learn how to use item pickers.
- 

In the previous chapter, you learned how to create items and fields. In this chapter, we'll expand on that knowledge by learning how to relate items. We'll create a second item type and teach you how to connect an item of one type with an item of the second type. You'll also learn about item pickers and lists, which are extremely useful in managing your relationships. By the end of this chapter, you'll be able to expand a WorkXpress application to be able to relate any number of items.

## Tom Needs to Assign Contacts to Accounts

In this example, we continue to use a fictitious character, Tom, and his needs for a basic business application.




***Tom said,** “I would also like to track contacts. I want to be able to search and add contacts from my main menu. These contacts will be employees of my accounts. Contacts will have a first name, a last name, an email address, a phone number and a home address. I want to be able to choose the employer from a list of accounts. On the account page, I want to see a list of all employees, their email addresses and phone numbers.”*

## How Tom's Need is Translated into WorkXpress Terms

### Review: The Five Building Blocks

All WorkXpress applications are built from **five (5)** fundamental building blocks. You must answer these five questions to design an application:

 <b>Items</b> - What people, places and things do we want to track?	 <b>Fields</b> - What types of data do we want to accumulate about our Items?	 <b>Layouts</b> - What sorts of pages or interfaces are required?
 <b>Relationships</b> - How are my Items interconnected?	 <b>Actions</b> - What do we want the computer to do for us automatically?	











Let's identify the building blocks from Tom's description. Each colored word below corresponds to the same color building block above.





*Tom Said, "I would also like to track **contacts**. I want to be able to **search** and **add contacts** from my **main menu**. These **contacts** will be **employees** of my **accounts**. **Contacts** will have a **first name**, a **last name**, an **email address**, a **phone number** and a **home address**. I want to be able to choose the **employer** from a **list of accounts**. On the **account page**, I want to see a **list of all employees**, their **email addresses** and **phone numbers**."*



## WorkXpressions Based on Tom's Need

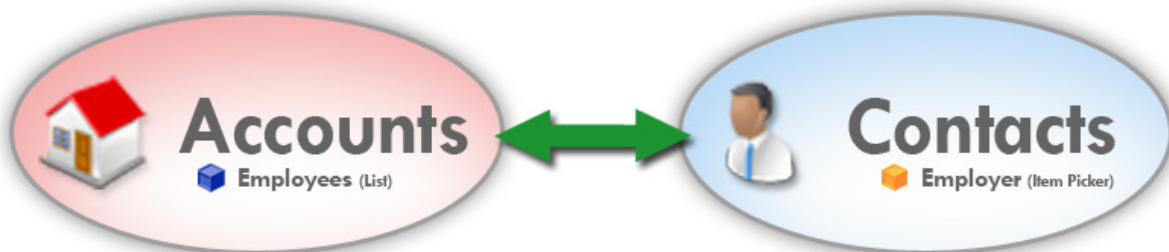
WorkXpressions are the actual building blocks required to implement the customer's need.

We interpret Tom's statement to mean that he needs an  **item type** called 'Contact'. He also needs a  **page** to add or view contacts, a  **page** to search contacts, and  **link fields** to add, view, and search the contacts. He needs a  **relationship type** that relates contacts to accounts. On the contact he needs a  **short text fields** labeled 'First Name' and 'Last Name', an  **email address field** labeled 'Email Address', a  **phone number field** labeled 'Phone Number', an  **address field** labeled 'Home Address', and an  **item picker field** labeled 'Employer' that chooses accounts.

A  **list** layout labeled 'Employees' needs to be added to the accounts page. In this list, the  **View Contact link**,  **email address field**, and  **phone number fields** from contact will be reused to create the columns of the list.

## Circle and Line Diagram

We commonly use a circle and line diagram to visualize the ways item types are interrelated.



## WorkXpress Objects Based on Tom's Need

Because all WorkXpress applications are just a combination of building blocks, it may be helpful to list out all of the building blocks in your application.

*Light gray text signifies that the building block was created in a previous chapter.*

### Items

 Accounts

 **Contacts**

### Relationships

 Employer to  Employee

### Fields

- Account Name (Short Text::Accounts) \*\*
- Address (Address::Accounts)
- Website (URL::Accounts)
- Phone Number (Phone Number::Accounts)
- Description (Long Text::Accounts)
- Type (Single Select::Accounts)
- Add Account (Link::Accounts) \*\*
- Search Accounts (Link::Accounts) \*\*
- View Account (Link::Accounts) \*\*
- **Contact Name (Short Text::Contacts) \*\***
- **First Name (Short Text::Contacts)**
- **Last Name (Short Text::Contacts)**
- **Email Address (Email Address::Contacts)**
- **Phone Number (Phone Number::Contacts)**
- **Home Address (Address::Contacts)**
- **Employer (Item Picker - Pick One::Contacts)**
- **Add Contact (Link::Contacts) \*\***
- **Search Contacts (Link::Contacts) \*\***
- **View Contact (Link::Contacts) \*\***

## Layouts

- Main Menu page (Page::Application) \*
  - Application Administration (Menu) \*
- Account Info Page (Page::Accounts) \*\*
  - Account Info (Field Grid) \*\*
  - **Employees (List)**
- Search Accounts Page (Page::Accounts) \*\*
  - Search Accounts (List) \*\*
- Contact Info Page (Page::Contacts) \*\*
  - Contact Info (Field Grid) \*\*
- Search Contacts Page (Page::Contacts) \*\*
  - Search Contacts (List) \*\*

## Actions

- **Relate Contact to Account Specified in Employer Item Picker \*\*\***

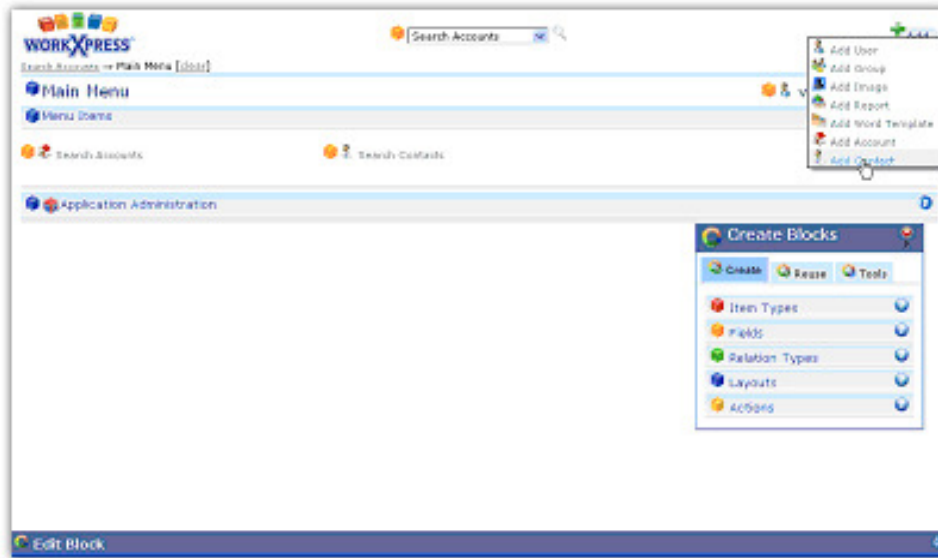
\* Created automatically when your WorkXpress application is created.

\*\* Created automatically when the item type is created.

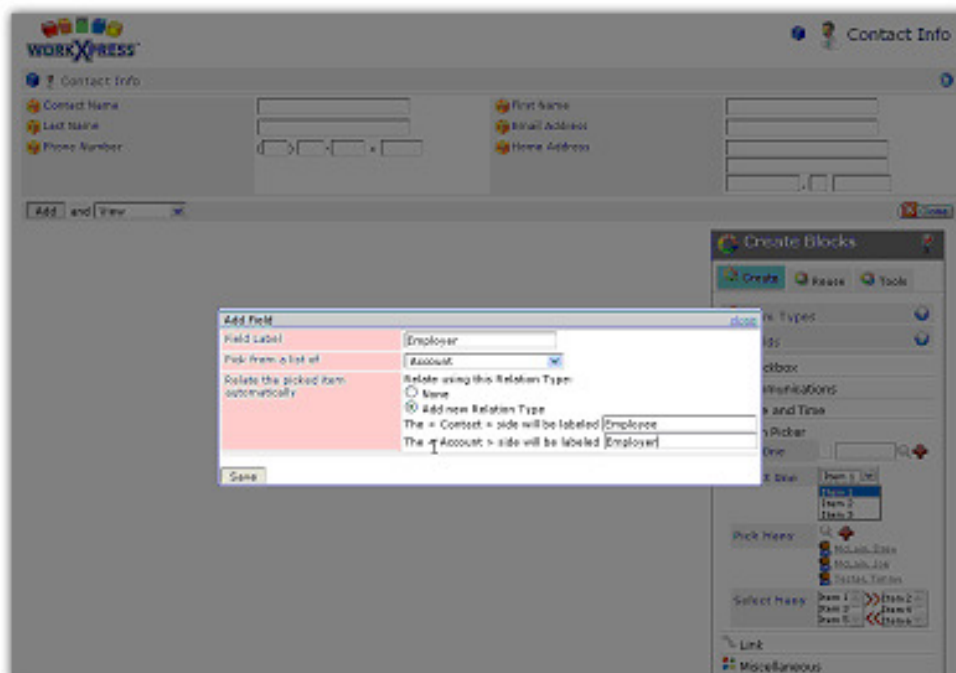
\*\*\*Created automatically through the Add Item Picker Wizard.

## Chapter 2 Walkthrough: Building Tom's Application

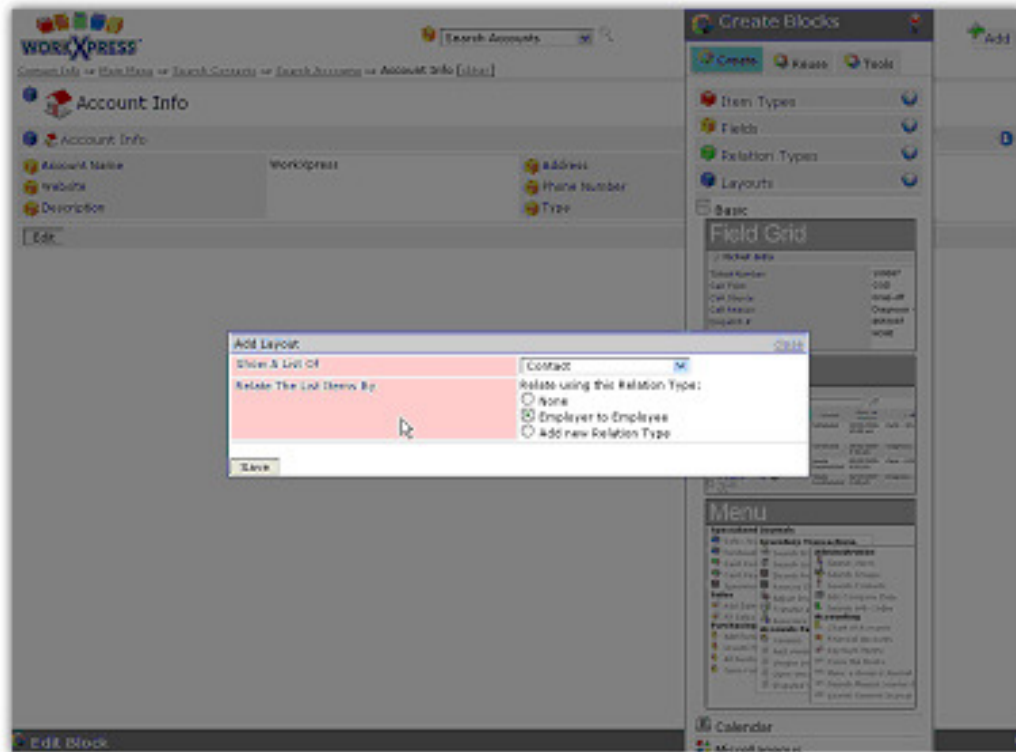
**Step 1:** Using the Block Creator, add a second item type called "Contact." Notice the system created an Add and Search link for you, and placed them on the main menu.



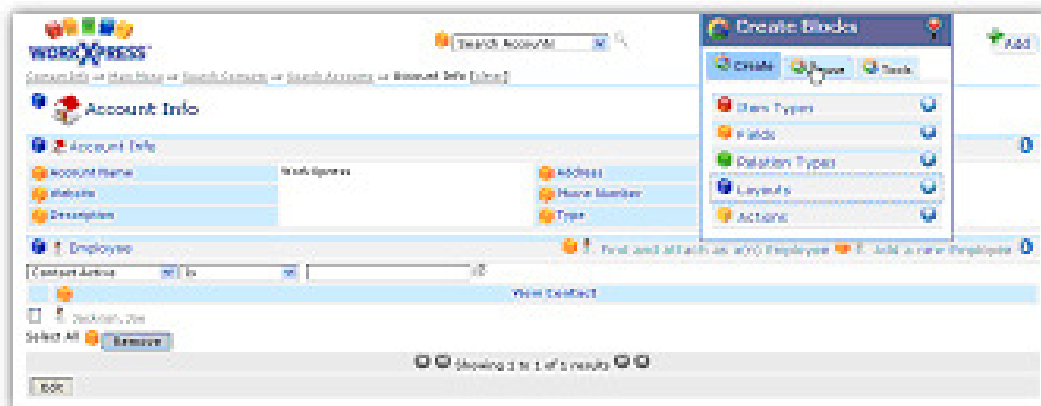
**Step 2:** Click the Add Contacts link, and on the Contact Info page start adding fields to your contact. When you add the "Item Picker: Pick One" field, choose to pick from a list of Accounts and notice the additional questions. Choose "Add New Relationship Type," label the Contact side "Employee" and the Account side "Employer."



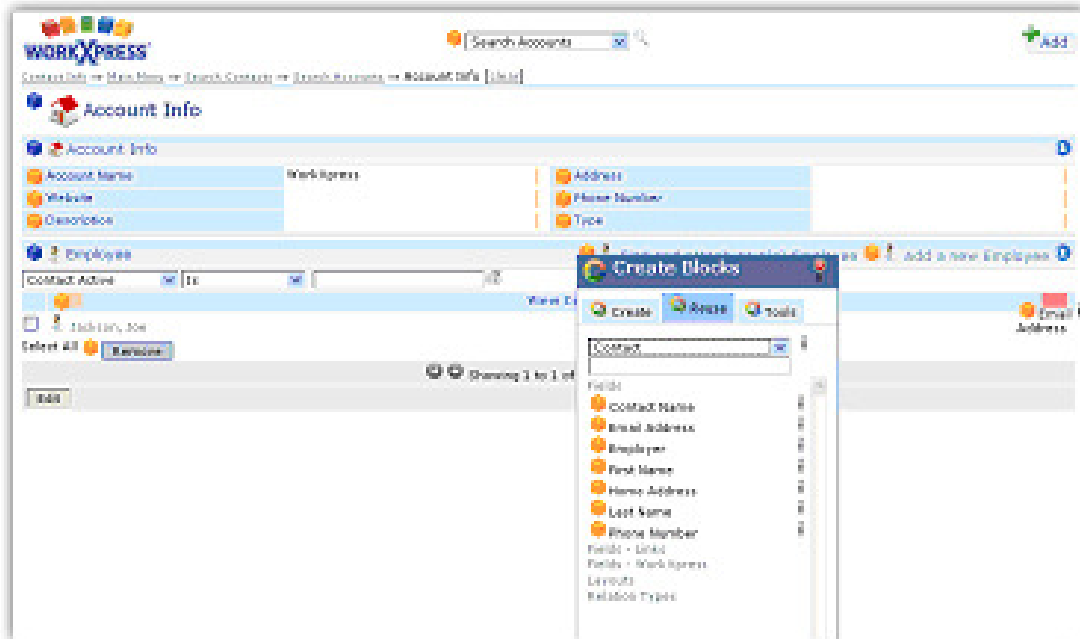
**Step 3:** Navigate to the Account Info page, and using the Create Blocks tool, drag a List Layout onto the page. You will be asked some questions about which Items you want to see in your list. Answer that you want to see a list of Contacts which are related to this account by the Employer to Employee relationship.



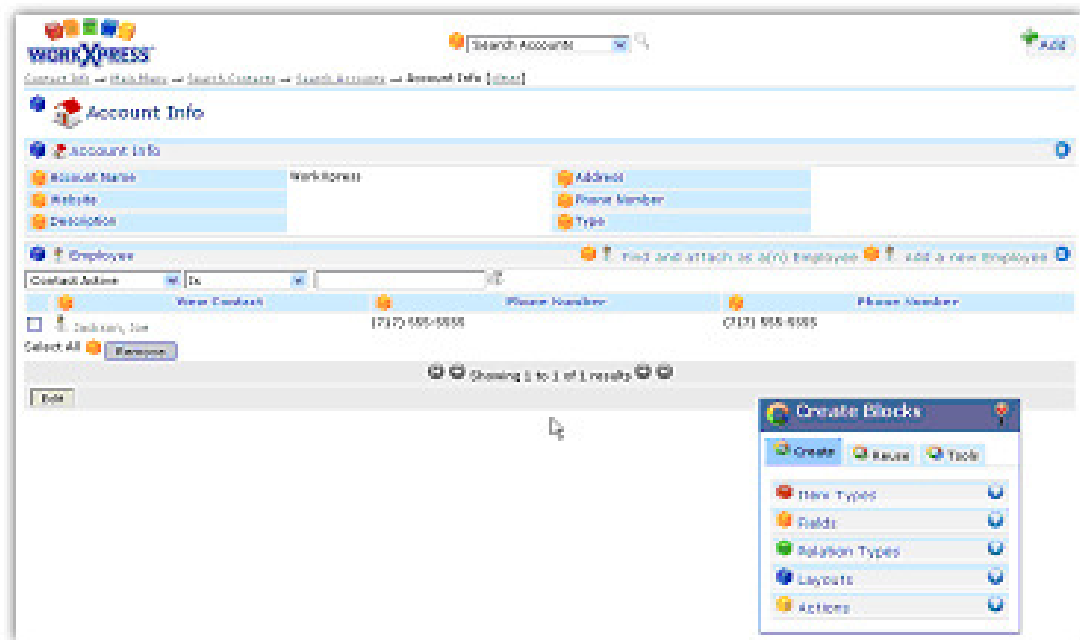
**Step 4:** Notice that your list has only one column. To add more columns, click on the Reuse tab of the Block Creator...



...choose "Contacts" from the drop down list and drag fields from the palette onto one of the orange drop points in the list.



**Completed!**



## Chapter 3

# Creating Workflow

### In This Chapter:

- Learn how to assign statuses.
- Learn how to create queues of items in each status.
- Learn how to use the data navigator to define a search list.

In the previous chapters, you learned how to create and relate items. In this chapter, we'll learn how to manage workflow in WorkXpress by taking tasks through a series of statuses. We'll create another item type to represent a task and assign it a series of possible statuses. We'll then create a series of lists to show which tasks have each status. We'll also introduce you to the WorkXpress Data Navigator and show you how to use it to define a list of items, which aren't directly related to another item. By the end of this chapter, you'll be able to define workflow in your own WorkXpress application.

## Tom Needs to Complete Tasks

In our example of how to begin in WorkXpress, we use a fictitious character, Tom, and his needs for a basic business application.



*Tom said, “Next, I would like to track tasks. Tasks have a date and time they are due. Tasks have a unique number that is assigned automatically, a short name, and a long description. Tasks can be assigned to one or many Contacts. Tasks get moved through a series of statuses beginning with unassigned, and progressing through in progress, on hold, awaiting final approval, approved, cancelled.*

*On the main menu, I would like to see links that launch list pages for all the tasks in each stage of workflow; unassigned tasks, tasks in progress, tasks on hold, tasks awaiting approval, approved tasks and cancelled tasks.*

*Finally, on the home page of an account, I would like to see a list of all the tasks assigned to all employees of that account.”*



## How Tom's Need is Translated into WorkXpress Terms

### Review: The Five Building Blocks

All WorkXpress applications are built from **five (5)** fundamental building blocks. You must answer these five questions to design an application:



Let's identify the building blocks from Tom's description. Each colored word below corresponds to the same color building block above.












*Tom said, "Next, I would like to track **tasks**. Tasks have a **date and time** they are due. Tasks have a **unique number** that is assigned automatically, **a short name**, and **a long description**. Tasks can be **assigned** to one or many **Contacts**. Tasks get moved through a series of **statuses** beginning with unassigned, and progressing through in progress, on hold, awaiting final approval, approved, cancelled.*



















*On the **main menu**, I would like to see **links** that launch list **pages** for all the **tasks** in each stage of workflow; unassigned tasks, tasks in progress, tasks on hold, tasks awaiting approval, approved tasks and cancelled tasks.*

*Finally, on the **home page** of an **account**, I would like to see a **list** of all the **tasks** assigned to all **employees** of that **account**."*

## WorkXpressions Based on Tom's Need

WorkXpressions are the actual building blocks required to implement the customer's need.

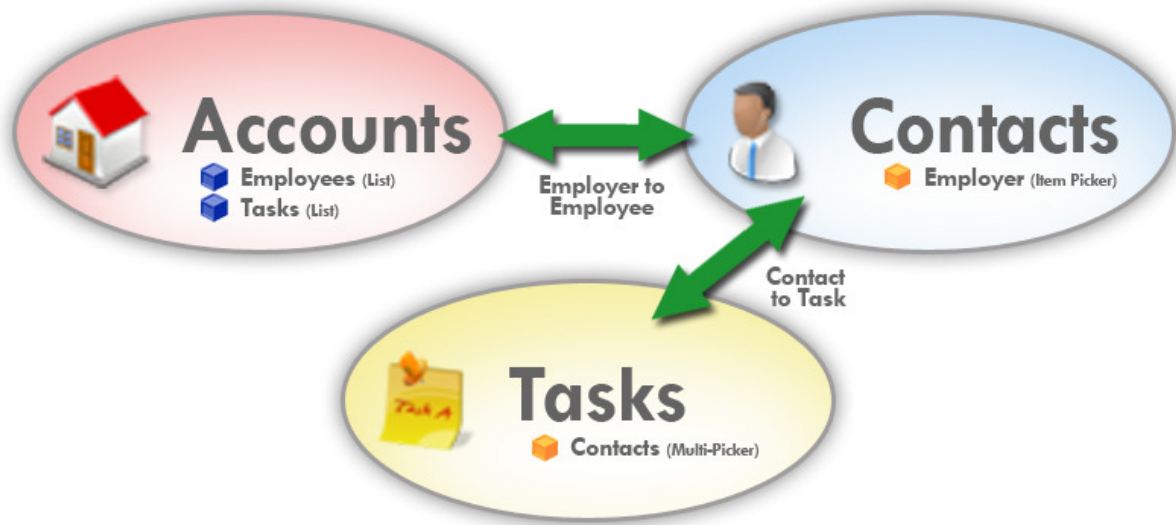
We translate Tom's need as an  **item type** called 'Task'. The customer also needs a  **page** to add or view tasks, a  **page** to search tasks, and  **link fields** to add, view, and search the tasks. On the task he needs a  **date & time field** labeled 'Due Date', an  **autonumber field** labeled 'Task ID', a  **short text field** labeled 'Name', a  **long text field** labeled 'Description', and a  **pick-many-style item picker field** labeled "Contacts". The customer also needs a  **relationship type** called "Contact to Task" to relate Contacts to Tasks. Additionally, he needs a  **single select field** labeled 'Status' with the options of 'Unassigned', 'In Progress', 'On Hold', 'Awaiting Final Approval', 'Approved', and 'Canceled'.

Added to the main menu will be a  **link field** labeled 'Unassigned Tasks' which will launch a  **page** containing  **list** of tasks with the filter 'Status is Unassigned', a  **link field** labeled 'Tasks in Progress' which will launch a  **page** containing  **list** of tasks with the filter 'Status is In Progress', a  **link field** labeled 'Tasks on Hold' which will launch a  **page** containing  **list** of tasks with the filter 'Status is On Hold', a  **link field** labeled 'Tasks Awaiting Final Approval' which will launch a  **page** containing  **list** of tasks with the filter 'Status is Awaiting Final Approval', a  **link field** labeled 'Approved Tasks' which will launch a  **page** containing  **list** of tasks with the filter 'Status is Approved', and a  **link field** labeled 'Canceled Tasks' which will launch a  **page** containing  **list** of tasks with the filter 'Status is Canceled'.

Finally, the customer needs a  **list** layout added to the account. This list layout will show all the tasks related to the contacts that are related to the account.

## Circle and Line Diagram

We commonly use a circle and line diagram to visualize the ways item types are interrelated.



## WorkXpress Objects Based on Tom's Need

Because all WorkXpress applications are just a combination of building blocks, it may be helpful to list out all of the building blocks in your application.

*Light gray text signifies that the building block was created in a previous chapter.*

### Items

 Accounts

 Contacts

 Tasks

### Relationships

 Employer to  Employee

 Contact to  Task

### Fields

- Account Name (Short Text::Accounts) \*\*
- Address (Address::Accounts)
- Website (URL::Accounts)
- Phone Number (Phone Number::Accounts)
- Description (Long Text::Accounts)
- Type (Single Select::Accounts)
- Add Account (Link::Accounts) \*\*
- Search Accounts (Link::Accounts) \*\*
- View Account (Link::Accounts) \*\*
- Contact Name (Short Text::Contacts) \*\*
- First Name (Short Text::Contacts)
- Last Name (Short Text::Contacts)
- Email Address (Email Address::Contacts)
- Phone Number (Phone Number::Contacts)
- Home Address (Address::Contacts)
- Employer (Item Picker - Pick One::Contacts)

- Add Contact (Link::Contacts) \*\*
- Search Contacts (Link::Contacts) \*\*
- View Contact (Link::Contacts) \*\*
- **Task Name (Short Text::Tasks) \*\***
- **Due By (Date & Time::Tasks)**
- **Task Number (Autonumber::Tasks)**
- **Description (Long Text::Tasks)**
- **Contacts (Item Picker - Pick Many::Task)**
- **Status (Single Select::Tasks)**
- **Unassigned Tasks (Link::Tasks)**
- **Tasks in Progress (Link::Tasks)**
- **Tasks on Hold (Link::Tasks)**
- **Tasks Awaiting Approval (Link::Tasks)**
- **Approved Tasks (Link::Tasks)**
- **Canceled Tasks (Link::Tasks)**
- **Add Task (Link::Tasks) \*\***
- **Search Tasks (Link::Tasks) \*\***
- **View Task (Link::Tasks) \*\***

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## Layouts

- Main Menu (Page::Application) \*
  - Application Administration (Menu) \*
- Account Info (Page::Accounts) \*\*
  - Account Info (Field Grid) \*\*
  - Employees (List)
  - **Tasks (List)**
- Search Accounts (Page::Accounts) \*\*
  - Search Accounts (List) \*\*
- Contact Info (Page::Contacts) \*\*
  - Contact Info (Field Grid) \*\*

- Search Contacts (Page::Contacts) \*\*
  - Search Contacts (List) \*\*
- Task Info (Page::Tasks) \*\*
  - Task Info (Field Grid) \*\*
- Search Tasks (Page::Tasks) \*\*
  - Search Tasks (List) \*\*
- Unassigned Tasks (Page::Tasks)
  - Tasks (List)
- Tasks in Progress (Page::Tasks)
  - Tasks (List)
- Tasks on Hold (Page::Tasks)
  - Tasks (List)
- Tasks Awaiting Approval (Page::Tasks)
  - Tasks (List)
- Approved Tasks (Page::Tasks)
  - Tasks (List)
- Canceled Tasks (Page::Tasks)
  - Tasks (List)

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### Actions

- Relate Contact to Account specified in Employer Item Picker \*\*\*
- **Relate Task to Contacts specified in Contacts Item Picker \*\*\***

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\* Created automatically when your WorkXpress application is created.

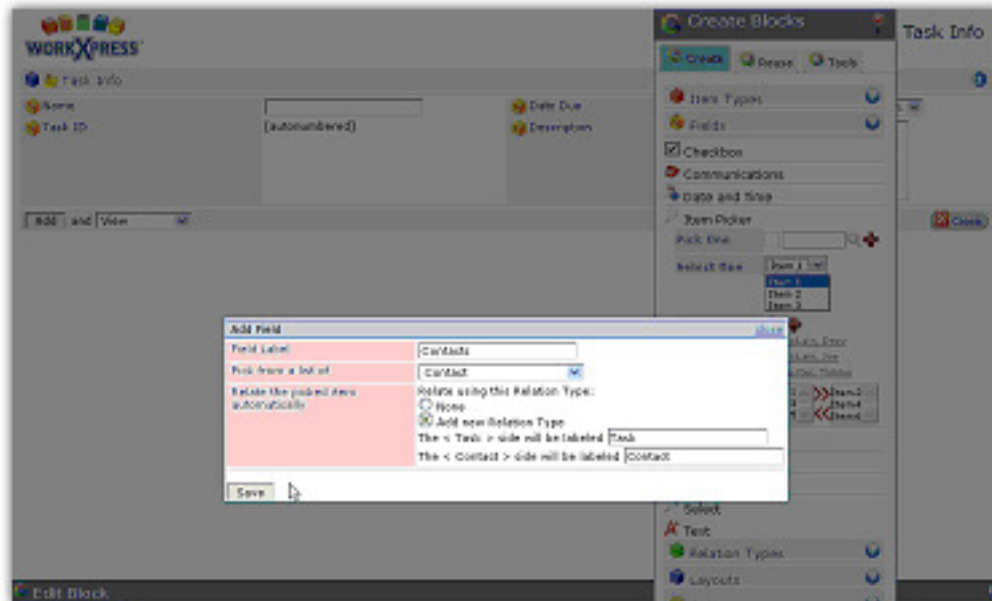
\*\* Created automatically when the item type is created.

\*\*\*Created automatically through the Add Item Picker Wizard.

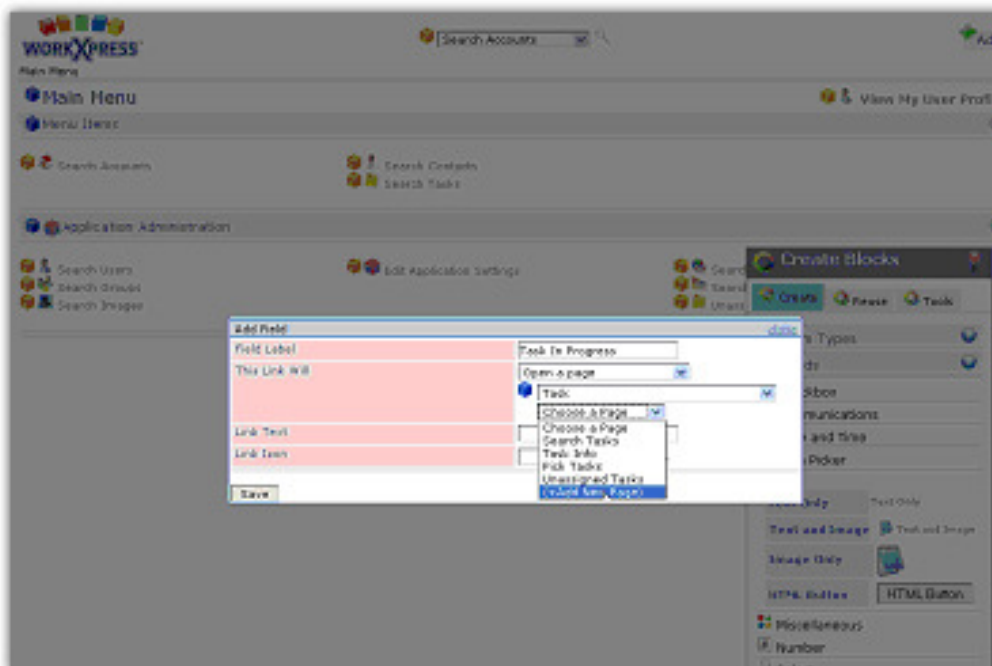
## Chapter 3 Walkthrough: Building Tom's Application

**Step 1:** Create a new Item Type called Task (see Chapter 1, 2)

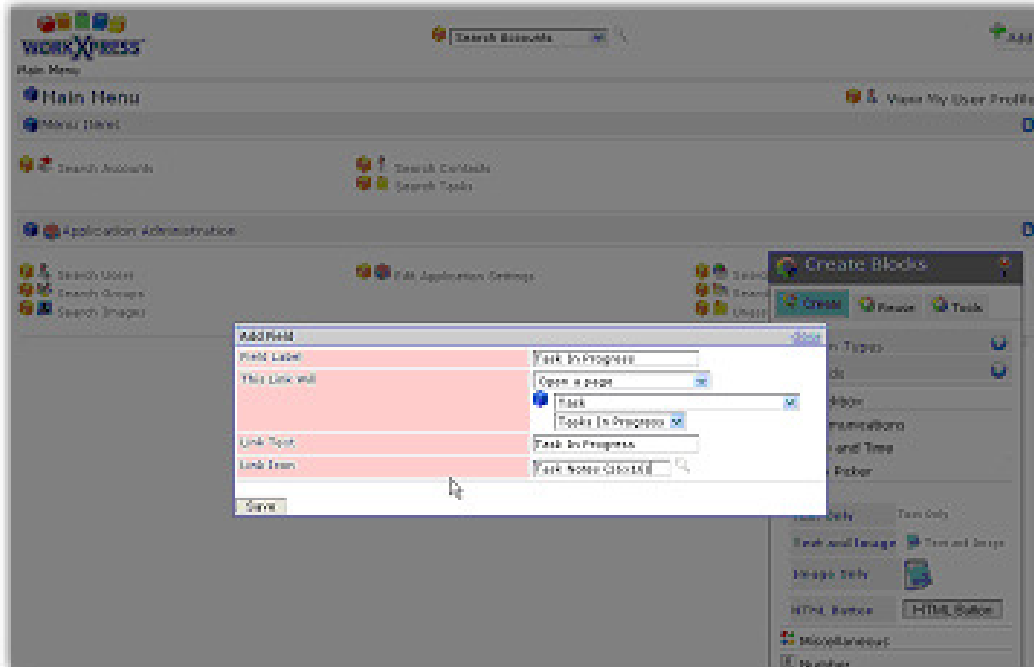
**Step 2:** On the Task Info page, add a Pick Many Item Picker from the Create Blocks tool. Choose from a list of Contacts, and create a new relationship between Contact and Task.



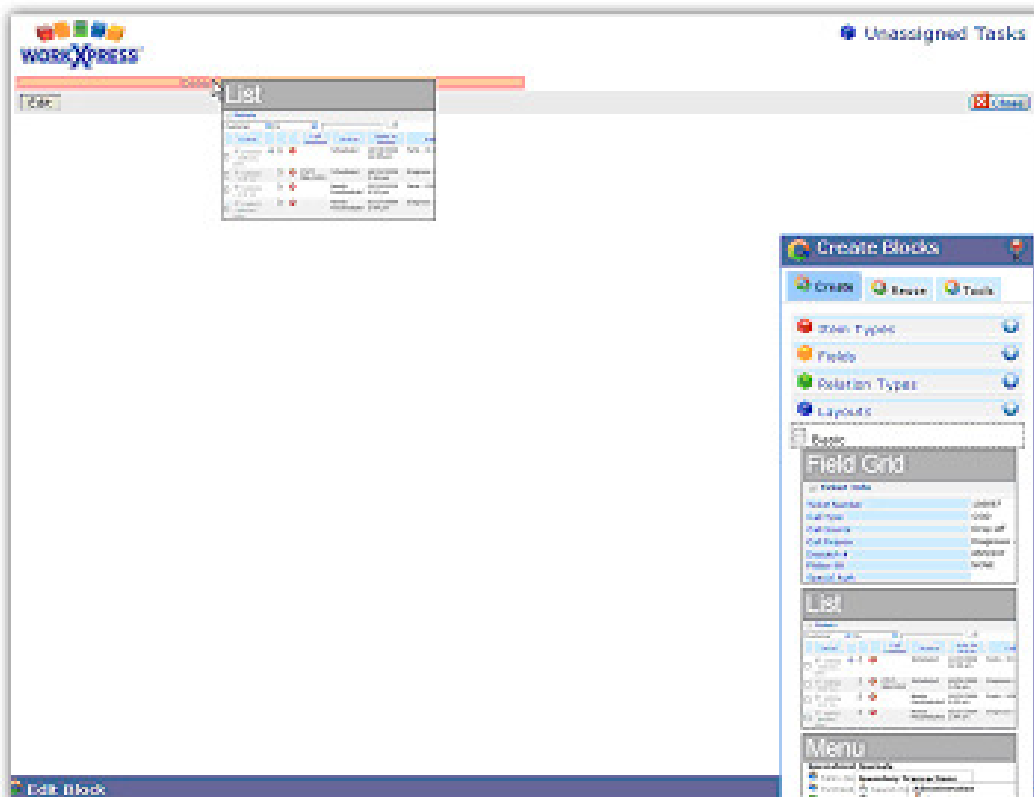
**Step 3:** From the main menu, let's create the first workflow queue, "Unassigned Tasks". Start by dropping a new link onto the main menu. Choose to have the link open a page. You will be presented with a drop-down list of items. Choose Task, and another drop-down will appear to choose the page. Choose "Add New Page."



Name the new page “Unassigned Tasks.” Save to add the link.

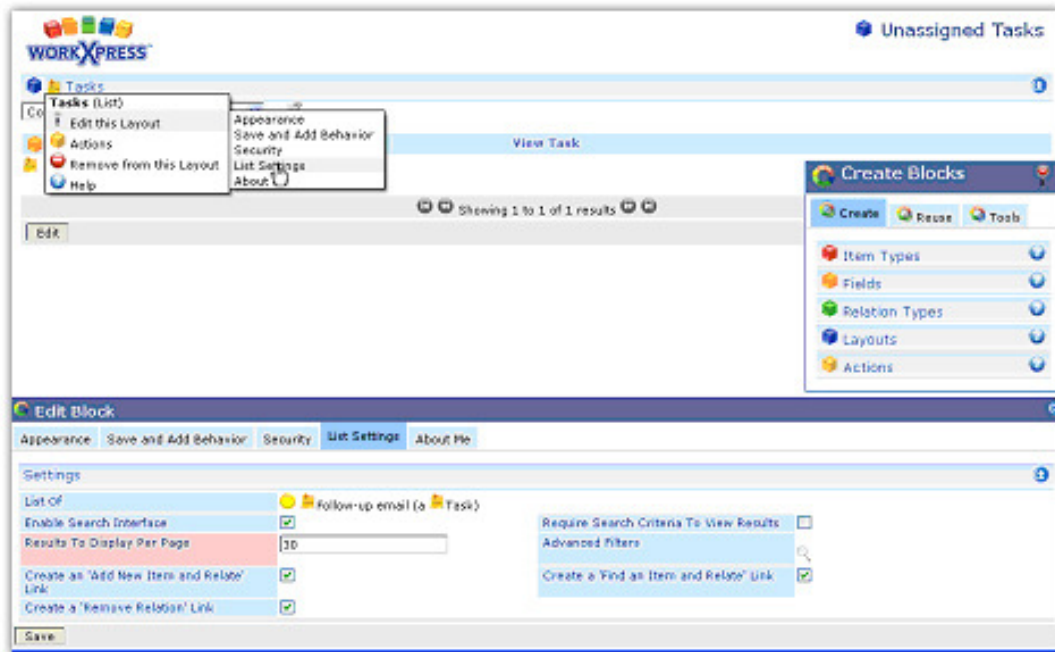


**Step 4:** Click the new link to navigate to the new page. It is empty. Drop a new list layout on it. Choose to show a list of tasks, but this time, choose “None” for the relationship type to use.

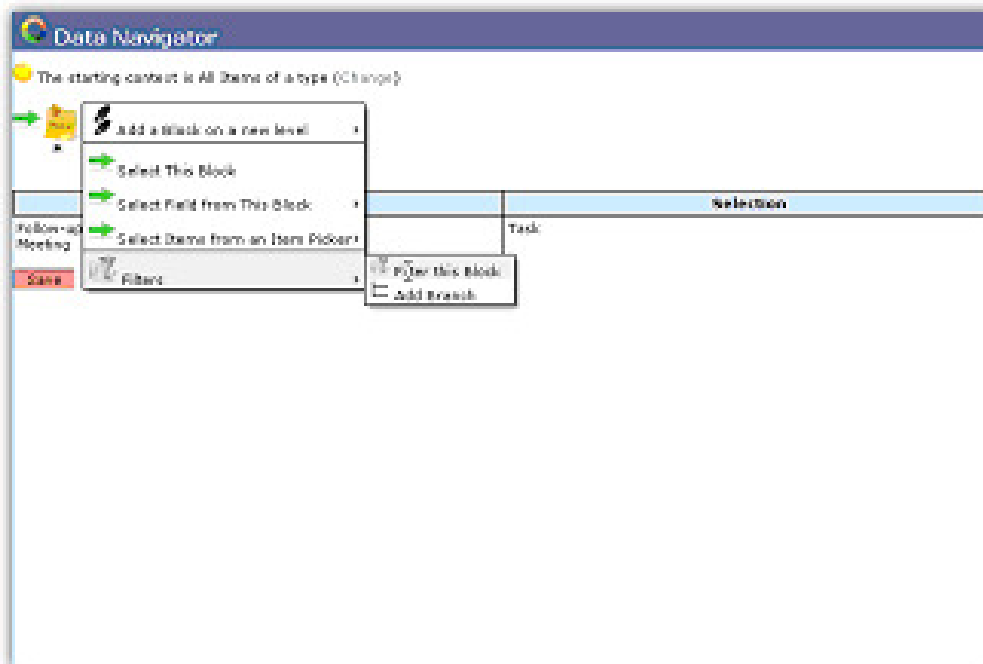




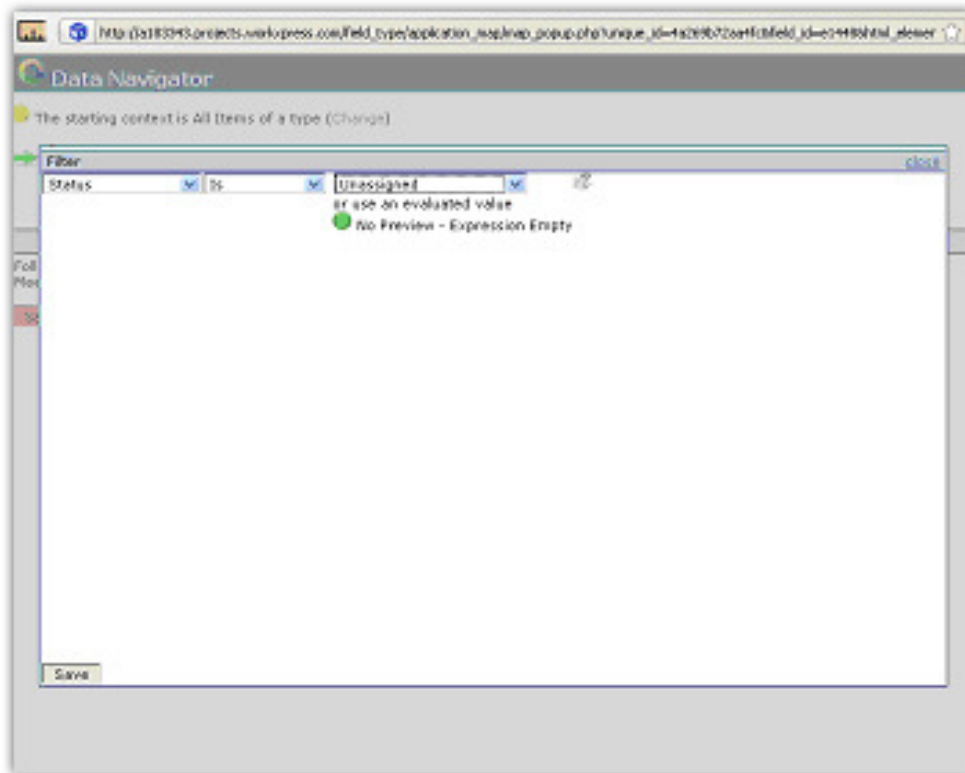
**Step 5:** click the blue block next to the list header to open its settings menu. Choose “edit this layout” and “list settings” to load the “Edit Block” tool that controls the contents of the list.



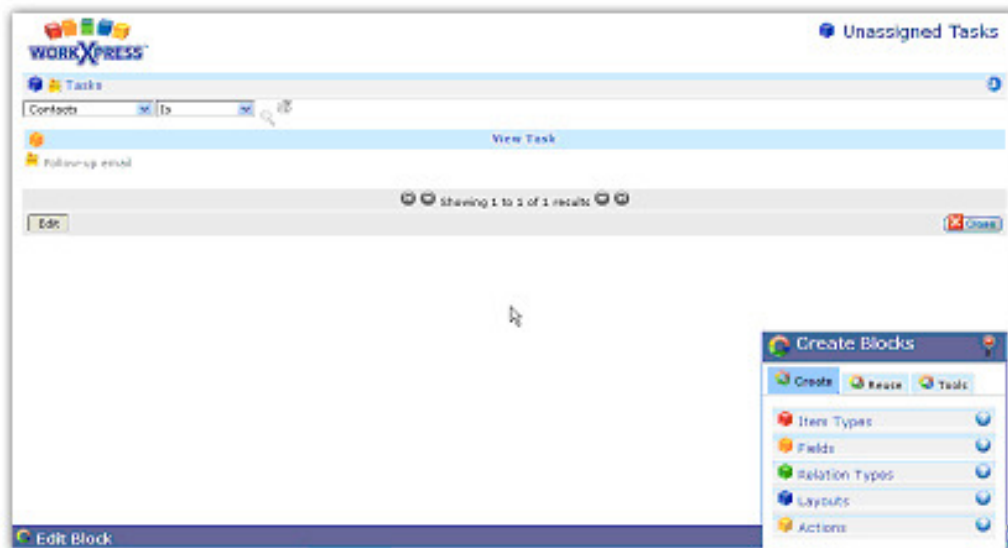
**Step 6:** Click on the “List of” field to launch the Data Navigator. Here you will define the set of items to appear in your list. Click on the Tasks icon to open a menu of options, and choose Filters → Filter This Block.



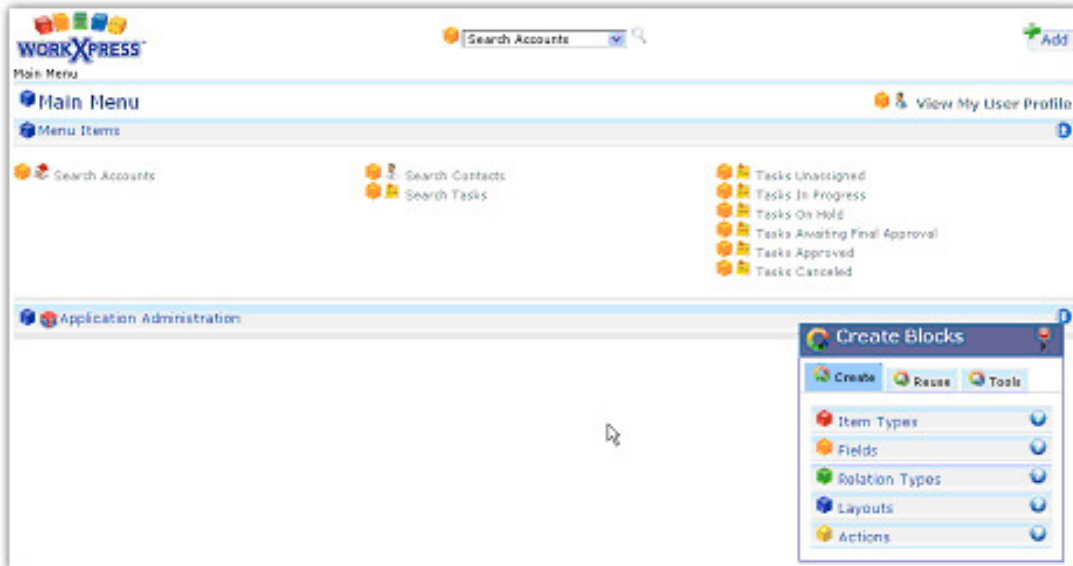
**Step 7:** Choose the status field, and filter for the status result that you wish to see in your list. In this case, choose “Unassigned.” Important! - Save your Data Navigator Screen and Save your Edit Blocks tab.



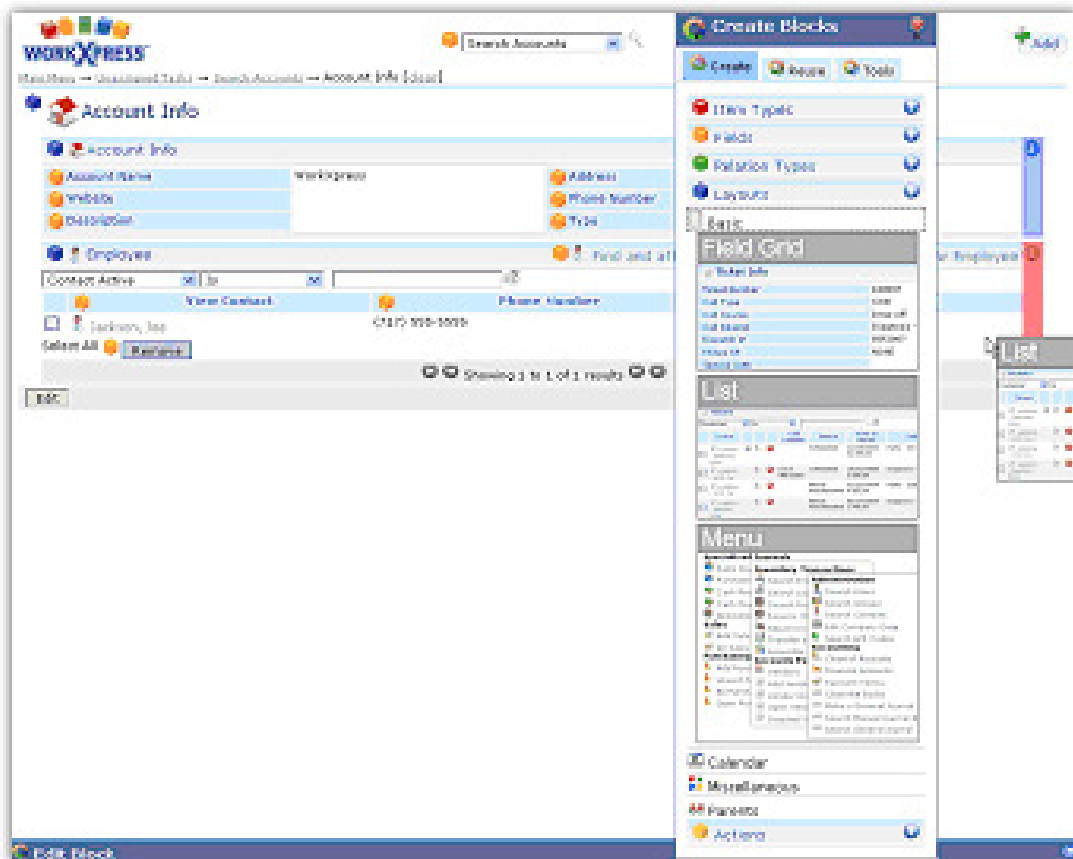
**Step 8:** Review your new workflow queue of “unassigned” tasks! You may elect to add some additional columns (see Chapter 2).



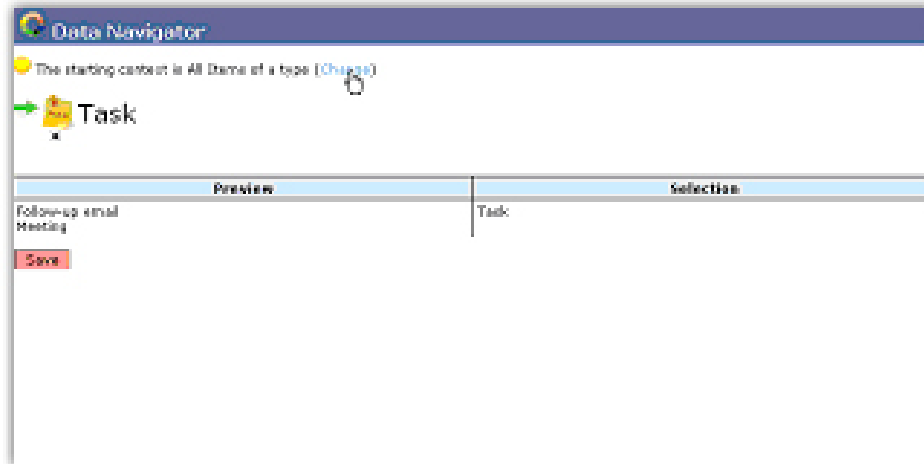
**Step 9:** Repeat steps 3 through 9 for each workflow queue that you would like. The result is below; notice the right-hand column with links to lists of all tasks in that particular status.



**Step 10:** Let's add a list of tasks to the Account. Start as always by navigating to the page you wish to work with. Drag a new list layout to the location where you want it.



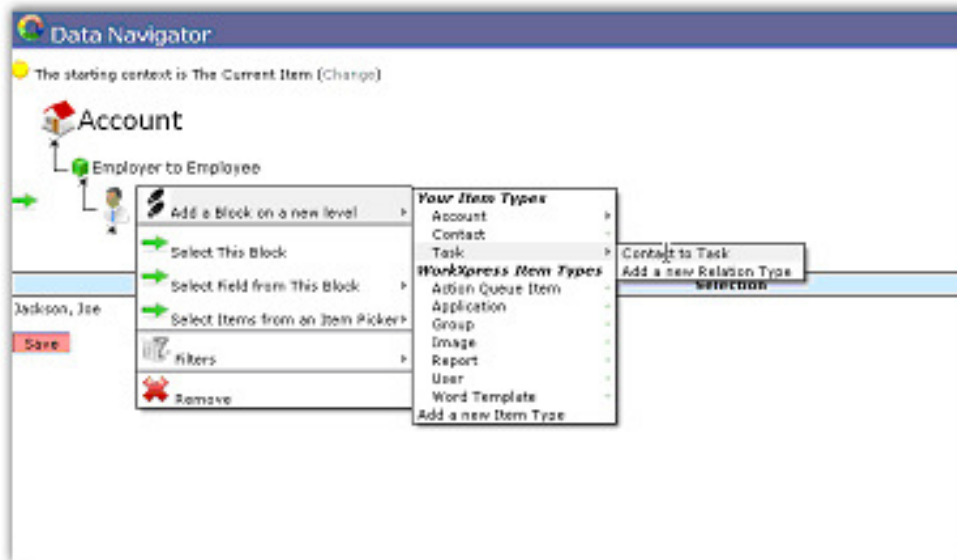
**Step 11:** Answer the questions for the list. Choose to display a list of Tasks, but keep in mind that you really want Tasks related to the Employees of this Account. You will need to navigate across two relationships to get this list. In the list settings (Edit Blocks Tool) click on the “List of” field(see step 5 above). You will need to change the starting context of this data map by clicking on “change”.



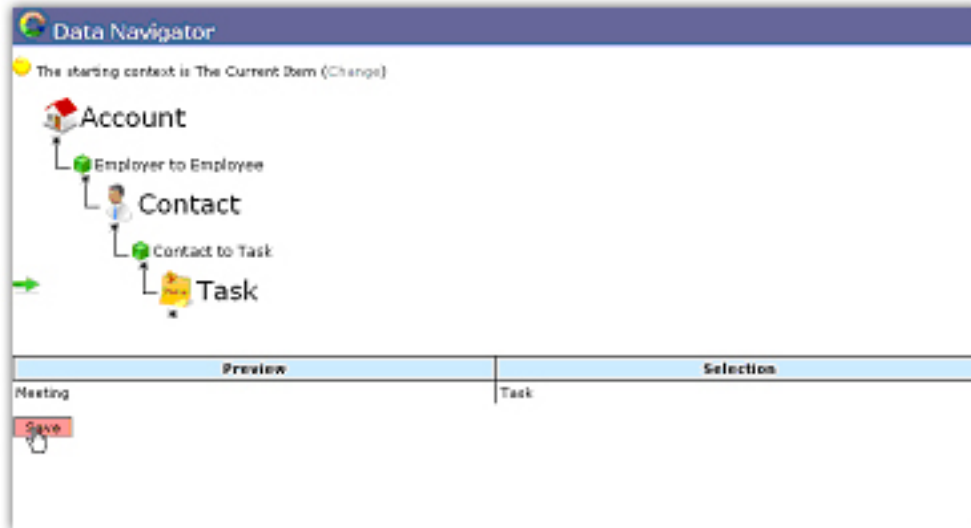
**Step 12:** Select “The Current Item” under the “Get Context From My Page” subheading to tell the Data Navigator you want to start from the current item.



**Step 13:** Click on the Account icon and navigate first to Contacts (across the Employer to Employee relationship). Now click on the Contact icon and navigate to Tasks (across the Contact to Task relationship).



**Step 14:** This is your final Data Map. Click Save! Save the Edit Blocks tool, and your list will now properly populate with all Tasks related to Employees which are related to this Account.



**Step 15:** Be sure to add some columns of data to your new list of tasks. Your Account page now looks something like this:

The screenshot shows the 'Account Info' page in WorkXpress. At the top, there is a search bar for accounts and a 'Create Blocks' button. Below the navigation bar, the 'Account Info' section displays details for 'WorkXpress', including its website, description as a 'Software supplier', and a type of 'Other'. The 'Employee' section shows a table with one entry: Joe Jackson, with phone number (717) 555-5555 and email joe@companyname.com. The 'Tasks' section shows a table with one entry: Meeting, with task ID 1 and due date 06/17/2009 11:30 am.

**Final:** Turn off the tools to view what users will see!

The screenshot shows the 'Account Info' page with more data. The 'Employee' table now lists three employees: Joe Jackson, Susan Miller, and Doug Wendt, each with their respective phone numbers and email addresses. The 'Tasks' table now lists two tasks: 'Conerence Call' (Task ID 3, due 06/30/2009 10:30 am) and 'Meeting' (Task ID 1, due 06/17/2009 11:30 am).