

# Sugorum

## *SugarCRM - agorum core DMS/ECM integration*

### *Version 6.4.3*


## Preinstallation


In order to run the Sugorum-Plugin, you first need a working agorum core 6.4.3 installation. You can download a copy from <http://www.agorum.com>

## Installation and Configuration

Installation is pretty easy. Go to Admin -> Module Loader. Upload Sugorum-6\_4\_3.zip and install it.

Clicking on the Tab (Other->)Sugorum, you will see a bunch of properties you can set. The following table describes the various properties:

| Property                                  | Description   | Suggestion   | Another Example   |
|---|---|--|---|
| agorum start folder name *                | the name of the root folder which will be shown in popup view   | agorum DMS   | Root  |
| agorum start folder id **                 | the id of your root folder (object id) in agorum core; get the id by clicking on the  symbol in desk4web (having the correct folder selected) in your agorum core installation (if a static folder is defined, all users use the same folder id. If not, every user can define a root-folder on his own) | 1004446  | 1037783   |
| agorum user **                            | the user name of your agorum installation (for the actually logged in SugarCRM user). If a static user is defined (see below), users are not able to define their own user. in this case the static user is always used by all users.   | demo   |   |
| agorum password **                        | the password according to the chosen user   | agorum   |   |
| agorum webservice url ***                 | the internal url for webservice calls from SugarCRM to agorum core  | <a href="http://roihost:80">http://roihost:80</a>  | <a href="http://213.12.23.3:80">http://213.12.23.3:80</a>   |
| agorum public url ***                     | the external url for browser calls (like opening desk4web out of SugarCRM)  | <a href="http://roihost:80">http://roihost:80</a>  | <a href="http://213.14.28.6:80">http://213.14.28.6:80</a>   |
| agorum view last modified search term *** | the search term being executed by the view last modified button in popup view (the default shows all last modified documents from the last 30 days)   | lastmodifier:\${USERID;} AND (lastmodifydatedate:[\${ACTDATE:-30} TO 99990101000000]) AND (ancestors:fileobject) | lastmodifier:\${USERID;} AND (lastmodifydatedate:[\${ACTDATE:-5} TO 99990101000000]) AND (ancestors:fileobject) |
| agorum static user ***                    | the user name of the static user of your agorum core installation; If this field is set by admin, all users use this static user. If this field is left blank, the users have to define their own agorum core user  |  | roi   |

|                                   |   |         |         |
|-----------------------------------|---|---------|---------|
| agorum static password ***        | the password according to the chosen static agorum user   |         | 12trbb7 |
| agorum static start folder id *** | the id of your root folder (object id) in agorum core; get the id by clicking on the  symbol (having the correct folder selected) in your agorum core installation; all SugarCRM users will use this agorum core start folder id if this field is not empty. | 1004446 |         |

\* Every SugarCRM user will be able to see this field.

\*\* Regular SugarCRM users won't be able to see these fields if the according static fields are set by an admin.

\*\*\* Only SugarCRM admins will be able to see these fields.

# Use

Once everything is installed, you can go ahead attaching files and folders to your SugarCRM Accounts, Contacts, Bugs, Cases, Leads, Opportunities and Projects.

Example:

Go to your contacts list and choose one of them.



## Contacts

| Name <input type="text"/> My items <input type="checkbox"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> <a href="#">Advanced Search</a> |                                    |                        |  |
|--|------------------------------------|------------------------|--|
| Actions ▾ Selected: 0  |                                    |                        |  |
| <input type="checkbox"/>   | Name ⇅                             | Title ⇅                | Account Name ⇅                               |
| <input type="checkbox"/>   | <a href="#">Lindsay Moya</a>       | VP Sales               | <a href="#">OTC Holdings</a>                 |
| <input type="checkbox"/>   | <a href="#">Gabrielle Cardinal</a> | VP Operations          | <a href="#">Smith &amp; Sons</a>             |
| <input type="checkbox"/>   | <a href="#">Sally Ordonez</a>      | President              | <a href="#">Trait Institute Inc</a>          |
| <input type="checkbox"/>   | <a href="#">Cornell Clack</a>      | VP Operations          | <a href="#">Powell Funding</a>               |
| <input type="checkbox"/>   | <a href="#">Mitch Pina</a>         | Director Sales         | <a href="#">Smith &amp; Sons</a>             |
| <input type="checkbox"/>   | <a href="#">Charlotte Napper</a>   | VP Operations          | <a href="#">SuperG Tech</a>                  |
| <input type="checkbox"/>   | <a href="#">Kathy Brainerd</a>     | Director Operations    | <a href="#">Q3 ARVRO III PR</a>              |
| <input type="checkbox"/>   | <a href="#">Olive Kamm</a>         | President              | <a href="#">Sea Region Inc</a>               |
| <input type="checkbox"/>   | <a href="#">Mathew Lingo</a>       | Senior Product Manager | <a href="#">JAB Funds Ltd.</a>               |
| <input type="checkbox"/>   | <a href="#">Deandre Cora</a>       | Director Operations    | <a href="#">Sea Region Inc</a>               |
| <input type="checkbox"/>   | <a href="#">Roseann Dixion</a>     | VP Operations          | <a href="#">Kings Royalty Trust</a>          |
| <input type="checkbox"/>   | <a href="#">Earnest Barnhardt</a>  | Director Operations    | <a href="#">B.C. Investing International</a> |
| <input type="checkbox"/>   | <a href="#">Riley Ascencio</a>     | Director Sales         | <a href="#">NW Capital Corp</a>              |
| <input type="checkbox"/>   | <a href="#">Adan Avendano</a>      | Senior Product Manager | <a href="#">Trait Institute Inc</a>          |
| <input type="checkbox"/>   | <a href="#">Casey Dingus</a>       | Director Sales         | <a href="#">Riviera Hotels</a>               |
| <input type="checkbox"/>   | <a href="#">Ezra Kapp</a>          | VP Operations          | <a href="#">Max Holdings Ltd</a>             |
| <input type="checkbox"/>   | <a href="#">Shad Shier</a>         | Director Sales         | <a href="#">T-Squared Techs</a>              |
| <input type="checkbox"/>   | <a href="#">Ramona Siler</a>       | Senior Product Manager | <a href="#">Union Bank</a>                   |
| <input type="checkbox"/>   | <a href="#">Daniel Nunn</a>        | IT Developer           | <a href="#">Coolview Net Ltd</a>             |
| <input type="checkbox"/>   | <a href="#">Valentine Mancini</a>  | IT Developer           | <a href="#">Tortoise Corp</a>                |
| Actions ▾ Selected: 0  |                                    |                        |  |

Now you can see a new subpanel called Sugorum (agorum core DMS).

**History**

Create Note or Attachment   Archive Email   View Summary

| Subject  | Status   |
|--|----------|
|  <a href="#">Discuss pricing</a>      | Sent     |
|  <a href="#">Arrange introduction</a> | Deferred |

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**Sugorum (agorum core DMS)**

Select

| Type    | Name | Download as PDF | Explorer/Edit | desk4web | Date Attached | agorum - ID |
|---------|------|-----------------|---------------|----------|---------------|-------------|
| No Data |      |                 |               |          |               |             |

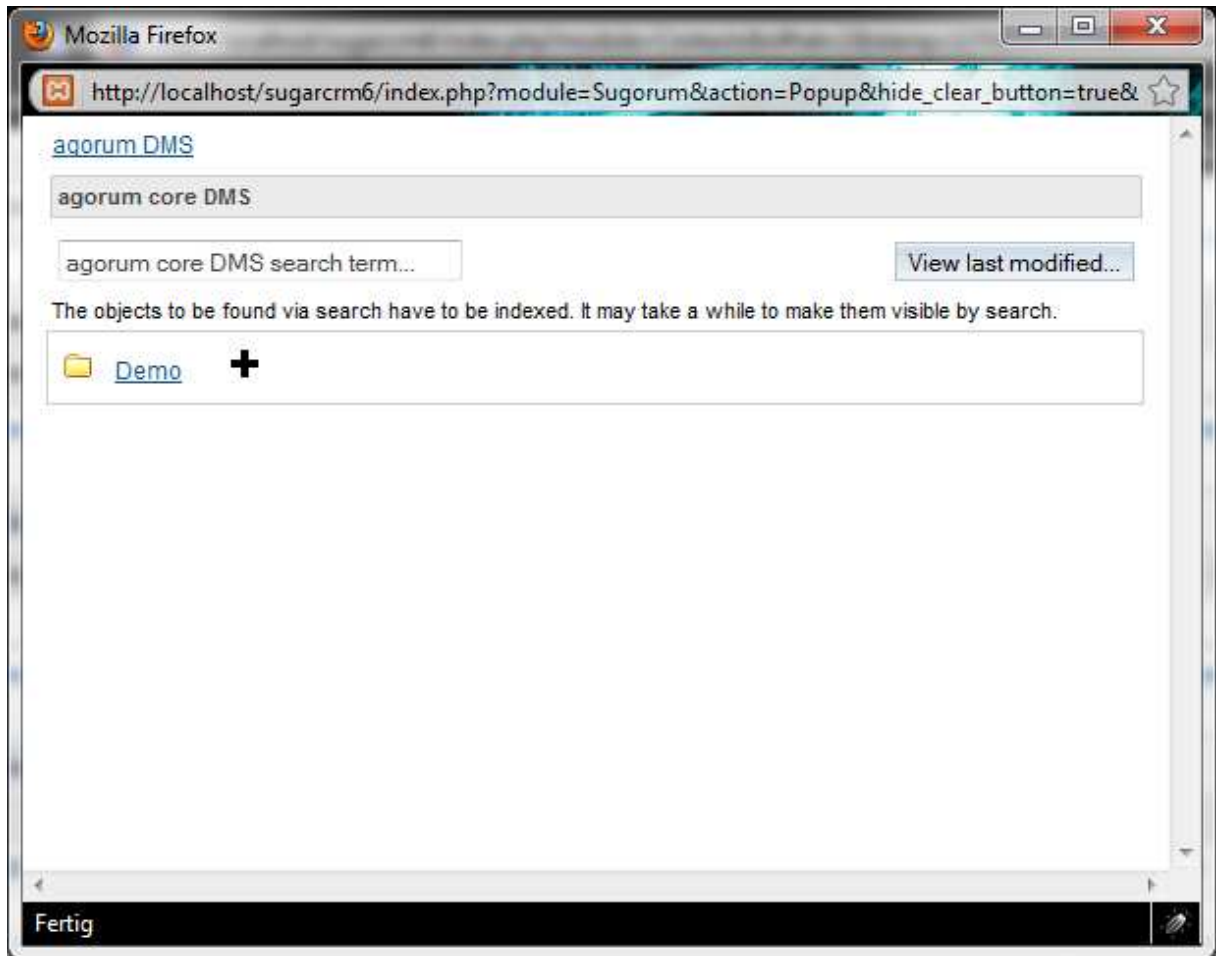
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**Opportunities**

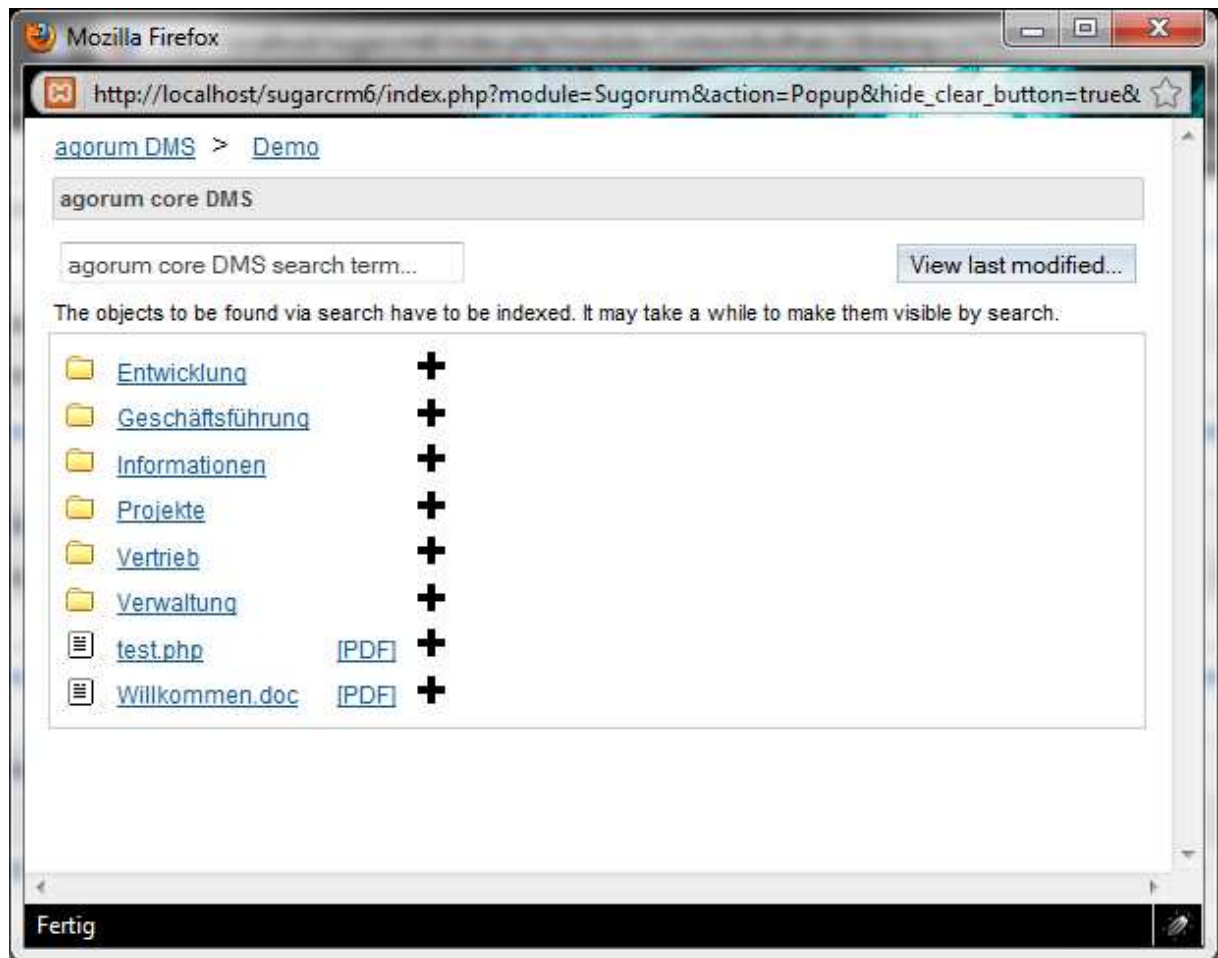
Create   Select

| Name   | Account Name                    |
|--|---------------------------------|
| <a href="#">Dirt Mining Ltd - 1000 units</a> | <a href="#">Dirt Mining Ltd</a> |

Clicking the Select button in this subpanel, you get a popup which shows you the contents including all of the files and folders of the previously chosen start folder id property.



Clicking on a folder name – in this case Demo – leads you to the contents of this folder. The breadcrumbs can always lead you back to where you came from when going steps deeper into the folders.



Clicking on a file name will cause a download of it. You can also download a file as pdf. This may take a while as the files are getting transformed server-site.

Another useful thing is the search engine.

The view last modified button gives you the newly modified objects. It depends on the search term that is specified in the agorum view last modified search term property how far it goes back into the past, if it gives you files and folders or only files and so on. Note that it may take a while to make newly modified objects searchable as they need to be indexed by your agorum core installation.



Using the search engine is – depending on how detailed you want to search – a little more complex. Here some facts about how to use the search engine:

- It is not case sensitive. So it doesn't make a difference whether you search for 'Demo' or for 'demo'.
- The "AND" (capital letters) operator is optional. Example: 'who are you' would give the same results as 'who AND are AND you'.
- You can use the word "OR" (capital letters) to search for several words, which not necessarily have dependencies to each other. Using the word "OR" always goes with brackets around the expression. Example: '(steve OR philipp)'
- You are allowed to put parts of the expression into another pair of brackets. Example: '((steve miller) OR (philipp coleman))' In this case you would search for results containing "steve" and "miller" or "philipp" and "coleman".
- There is an operator called "NOT" (capital letters). You can use "NOT" to exclude certain search words. Example: '((steve miller) AND NOT (philipp coleman))'
- Special characters such as "+", "-", "&", "|", "!", "(", ")", "{", "}", "[", "]", "^", "~", "\*", "?", ":", "\\", " " have to be masked by using "\" with each special character. Example: 'what are you looking for\?'
- You can do similarity search by using "~" at the end of the word. Example: 'theater~' to get both "theater" (American English) and "theatre" (British English)
- Search for words in a special order can be done by using the character "~" around the expression. Example 1: 'in this order' ~ The results here would contain the expression exactly in the way it's written. Example 2: 'test phase' ~5 ~ The results here would contain the words in the order of the expression and the words can have a maximum of 5 other words in between.
- You can exclude words within the documents you want to find. Example: 'task -done' This expression would give you all tasks, which are not done yet.
- The relevance of a search word can be important. Example: 'free^2 software' "free" has a higher priority than software now. The factor has to be greater than 0 at least.

Now the most important thing: If you click on one of the black crosses, the according object will be attached to the contact you have chosen – in this case test.php.

**History**





Create Note or Attachment   Archive Email   View Summary

| Subject  | Status   |
|--|----------|
|  <a href="#">Discuss pricing</a>      | Sent     |
|  <a href="#">Arrange introduction</a> | Deferred |

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**Sugorum (agorum core DMS)**

Select

| Type  | Name   | Download as PDF   | Explorer/Edit   | desk4web  | Date Attached      | agorum - ID |
|---|--|---|---|---|--------------------|-------------|
|  | <a href="#">test.php</a> <a href="#">[PDF]</a> |  |  |  | 07/15/2010 06:56pm | 1050550     |

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**Opportunities**



Create   Select

| Name   | Account Name                    |
|--|---------------------------------|
| <a href="#">Dirt Mining Ltd - 1000 units</a> | <a href="#">Dirt Mining Ltd</a> |

It is also possible to attach folders.

**History**









Create Note or Attachment   Archive Email   View Summary

| Subject  | Status   |
|--|----------|
|  <a href="#">Discuss pricing</a>      | Sent     |
|  <a href="#">Arrange introduction</a> | Deferred |

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**Sugorum (agorum core DMS)**

Select

| Type  | Name   | Download as PDF   | Explorer/Edit   | desk4web  | Date Attached      | agorum - ID |
|---|--|---|---|---|--------------------|-------------|
|  | <a href="#">test.php</a> <a href="#">[PDF]</a> |  |  |  | 07/15/2010 06:56pm | 1050550     |
|  | <a href="#">Demo</a>                           |  |  |  | 07/15/2010 06:58pm | 1026136     |



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**Opportunities**

Create   Select

| Name   | Account Name                    |
|--|---------------------------------|
| <a href="#">Dirt Mining Ltd - 1000 units</a> | <a href="#">Dirt Mining Ltd</a> |

Clicking on a file name and [PDF] will cause the same actions as in popup view. Clicking on a folder name will open the popup view and show the contents of this folder.

If you click on the  symbol, you will be able to modify this file in the file-extension-according program on your desktop. If you click on the  symbol, your local explorer will open and show the contents of this folder. These two features are only able when having the agorum core Windows client installed.

If you click on the  symbol, desk4web will open and show the object information for this file. If you click on the  symbol, desk4web will open and show the contents of this folder.

We hope, you'll enjoy it...

Your agorum core Team

Open Source DMS / ECM