

# User's Guide

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## Introduction

The information in this guide is intended primarily for users of Kayxo Insight. This guide assumes you have experience with the following:

- Using Microsoft Windows
- Using Microsoft Outlook

This manual is intended for all users of Kayxo Insight regardless the Kayxo Insight Application currently running. It contains basic information that applies to all types of Kayxo Insight Applications. In most cases the Kayxo Insight Application introduces new elements/features and should be accompanied by an additional manual.

The examples presented in this guide apply to a specific sample application but the ideas and work patterns that they show can be used by all users of Kayxo Insight.

## Before You Begin

Before you start reading this guide you must be aware that Kayxo Insight is not an out-of-the-box, one-size-fits-all application. It is rather a highly configurable and highly extendable framework for implementing customized solutions. You will be working with such customized solution called Kayxo Insight Application. Therefore it is not possible to describe in this guide all the elements/features that have been introduced or modified by the application you use. You will find more information in [Application Programmers Tutorial](#) document

This guide attempts to describe all standard features and uses the typical application as an example. In case a feature is likely to be customized in the application you use, it is marked as **CUSTOMIZABLE**.

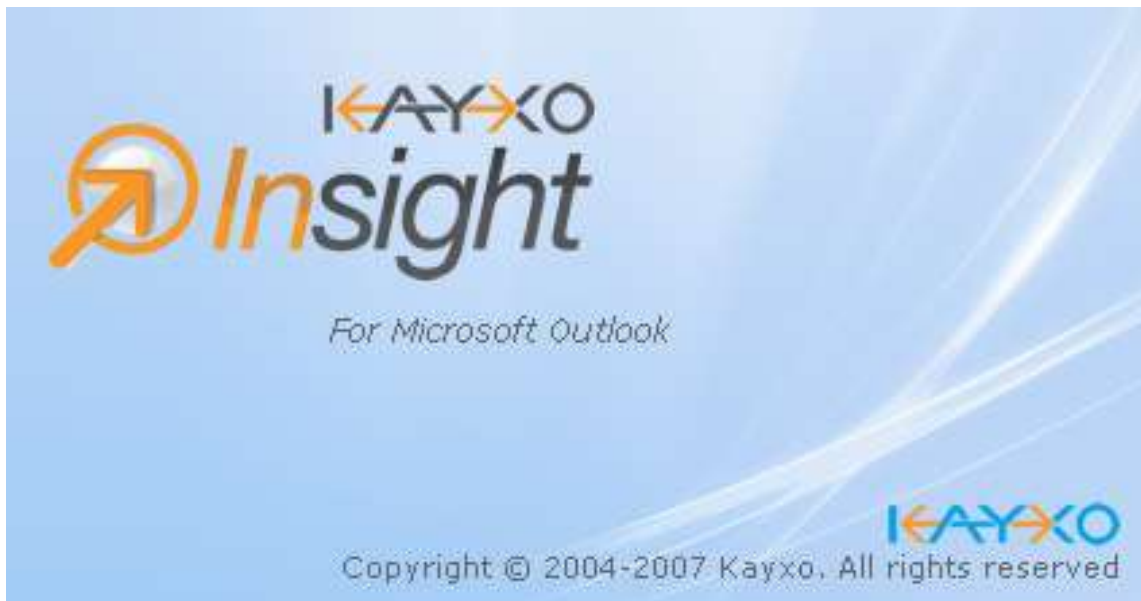
The Kayxo Insight Application you use should come with a separate manual that describes the elements/features specific to it.

## Getting Started

### First Impression

You've just been informed that from now on you will work with Kayxo Insight. Kayxo Insight has been already installed on your computer. Your Administrator has configured it for you. You start your Microsoft Outlook...

The very first thing you will notice is the splash screen of "Kayxo Insight":



**Figure 1**

Then the splash screen disappears and you see the Microsoft Outlook main window. This is the Microsoft Outlook you are familiar with. At first sight nothing has been changed or added.

But let us look closer...

## Looking Closer

Look at the folder list in the Microsoft Outlook Navigation Pane (left panel). You can see that some new folders appeared. What you actually see may look like this:

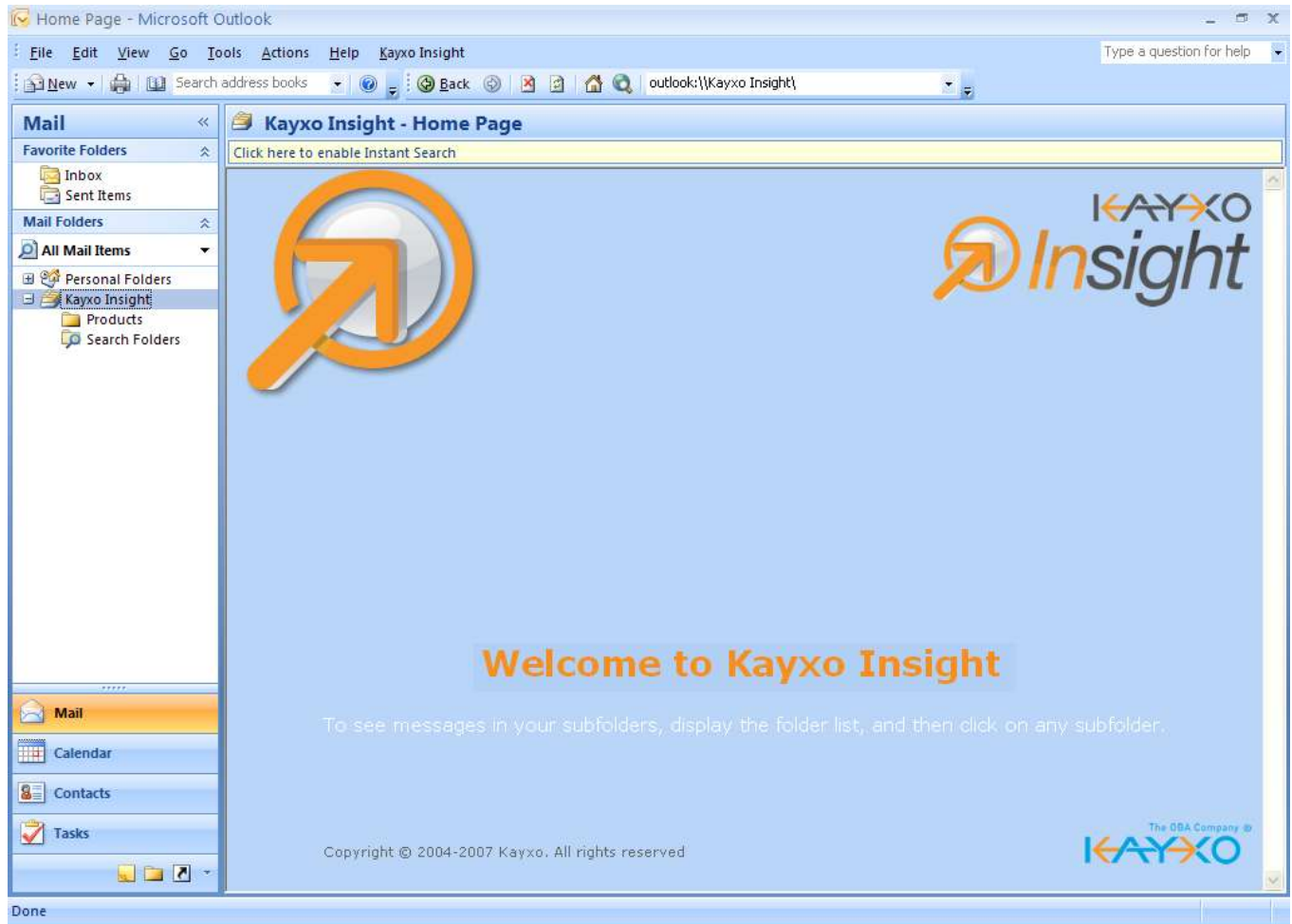


Figure 2

### CUSTOMIZABLE.

The folder view with the Welcome Message is customizable. What you actually see in the Microsoft Outlook View may look different.

The “Kayxo Insight” folder and all its subfolders belong to newly added Kayxo Insight Message Store. The store does not need to be called “Kayxo Insight” (it may have a different display name in your case). You can read about the Kayxo Insight Store in “Kayxo Insight Message Store” and “Working with... Kayxo Insight Store folders” chapters of this guide.

The next new element you may spot is the “Kayxo Insight” option in the Microsoft Outlook main menu.

Information about Kayxo Insight’s menu options can be found in the “Kayxo Insight Menu Options” chapter.

As you see, Kayxo Insight has added some new user interface elements to your Microsoft Outlook. Not all of them have been presented in this chapter. You will have to continue reading this guide to get familiar with all of them and understand what you can achieve when you start using them.

## Kayxo Insight Overview

This is out of scope of this document to explain in details how the Kayxo Insight works and what are its capabilities. But you should know what Kayxo Insight offers to you as a user. The main feature of the Kayxo Insight is:

### Consolidating Business Information

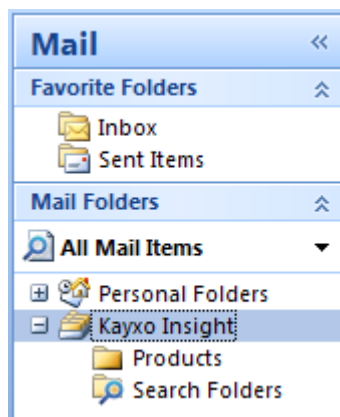
Kayxo Insight provides a common point of access to the entire set of business communication and other relevant business information. Access is provided by establishing the access to comprehensive business object counterparts managed in various third party and legacy information management systems. Kayxo Insight, an extension to Microsoft Outlook, presents the consolidated business information set. Users no longer have to access different applications for similar information, but may access all business communication regardless of format, type, and information management system through a single well-known user interface. Logging into Microsoft Outlook automatically provides users access to the consolidated business information set, while maintaining the item's level of access control provided by the various information management systems.

## User Interface Elements

This chapter describes Kayxo Insight’s user interface elements. These elements are controls and data presentation objects such as tables, lists, etc. In this chapter you will find brief descriptions of these elements. Refer to “Working with...” chapters to learn more about how to use these controls and data presentation objects.

## Kayxo Insight Message Store

Kayxo Insight Message Store is the new store that has been opened for you by the Kayxo Insight. You can treat it as a second Mailbox or rather extra Public Folders store since it usually contains shared data. The opened message store is shown in the folder list in the Microsoft Outlook Navigation Pane (left panel). The folder list may look like this:



**Figure 3**

The “Kayxo Insight” folder and all its subfolders belong to Kayxo Insight Message Store. You should think about “Kayxo Insight” as a store, but actually it is a root folder of the store.

### **CUSTOMIZABLE.**

The store does not need to be called “Kayxo Insight” (it may have different display name).

## Kayxo Insight Message Store Folders

Typically, the folders within the Kayxo Insight Store represent the so-called Business Objects like Companies, Contacts, Projects, etc.

### **CUSTOMIZABLE.**

The folder structure is defined by configuration and is application-dependant.

A folder can be static or dynamic. Dynamic folders are created out of information from database and therefore may change. For example: if the folder "Companies" has dynamic "Regions" subfolders defined, then the number of Regions (and Region folders) may be changing as new Companies (located in new regions) are added.

☞ Typically the folders within the Kayxo Insight Store are not containers for messages. They rather act as filters (like Search Folders in Outlook). So when selecting a folder in Microsoft Outlook you should expect to view some items that this folder filters for you. For example: selecting the "Customers" folder may show all communication items for customers (e.g. e-mails). Folders showing communication items are typical solutions in Kayxo Insight.

**CUSTOMIZABLE.** Kayxo Insight is highly configurable and a folder can be configured to display any type of data. For example: the "Customers" folder may display the list of customers and act as Outlook container.

Typically, folders within the Kayxo Insight Store are static from the user's perspective. Users cannot delete, add, rename or change folder properties. This can be done by changing the configuration by System Administrators. In case of using dynamic folders, a user can observe changes in folder structure. And if the running Kayxo Insight Application allows item manipulation (add, edit, delete) then a user may observe the changes in folder structure as a result of his/her actions.

## Kayxo Insight Message Store Views

Whenever you select a folder within the Kayxo Insight Store, Microsoft Outlook displays data for this folder in the Explorer's View (right side of the main Microsoft Outlook window). These views behave like any of Microsoft Outlook's standard views (e.g. Inbox). All the standard operations are supported. You can:

- scroll items using mouse or keyboard.
- group items using standard Microsoft Outlook's "Show in Groups" functionality.

- search using standard Microsoft Outlook search functionality.
- search using Microsoft Outlook's "Advanced Find" (only subject and message body search is available).
- change the size and order of columns.
- modify the fields font, size and color.
- add or remove columns.
- sort by columns.
- Add, edit or delete items (if supported by the Kayxo Application running)

You can also open (inspect) items and see the information through an inspector created by you. To learn how to do this, refer to "Working with... Kayxo Insight Outlook Views" chapter.

**CUSTOMIZABLE.** The type of data that you inspect in the Explorer's View (items and columns) is defined for you in Kayxo Insight Application configuration. The configuration defines also the functionality within the view (also by using specific data sources that may not support full Microsoft Outlook functionality) so you may expect some changes comparing with standard Microsoft Outlook views (e.g. some columns may be configured as "non sortable" or "Advanced Find" feature may be unavailable).

Whenever you modify the view (e.g. change the order of the columns or add/remove columns), the current settings are stored as your private settings and will be restored on the next use of the view.

The view for the folder can contain user controls. These controls are displayed in panels. You can have up to 6 user controls configured for each folder using Microsoft Outlook 2007 (5 in case of Microsoft Outlook 2003). The controls can show various types of data in various formats. Typically they are pie charts, graphs, summary reports for the view, etc.

**CUSTOMIZABLE.** The number and type of controls in the Explorer's View is defined for you in Kayxo Insight Application configuration. The controls can be either standard .Net 2.1 controls, or specialized user controls that can read data from the items selected in the view.

The following picture shows the Microsoft Outlook window. The view shows the user control (pie chart) in the bottom pane. The picture is taken from the example application that comes with Kayxo Insight.

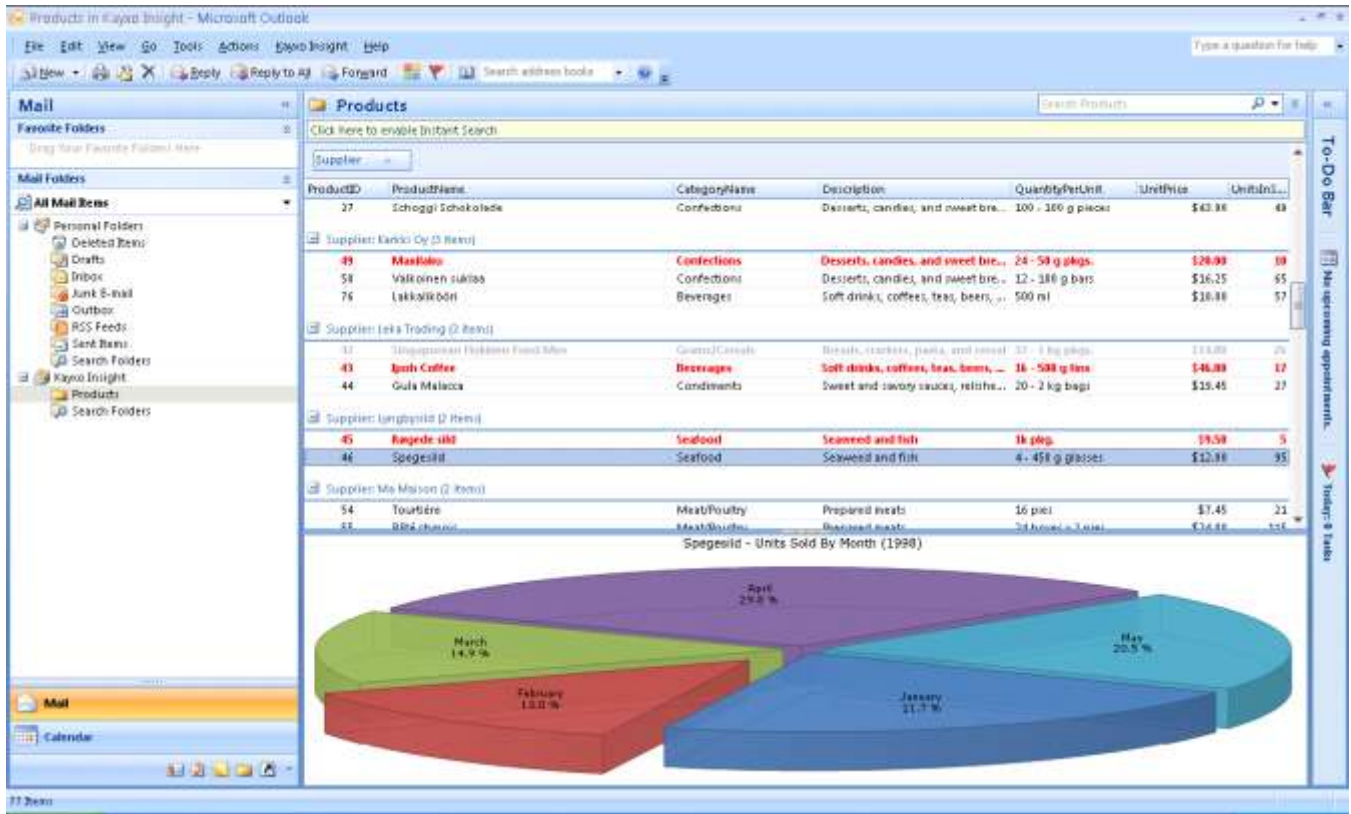


Figure 4

## Kayxo Insight Menu Options

Kayxo Insight adds the "Kayxo Insight" option in the main Microsoft Outlook's menu:



Figure 5

This option opens drop-down menu with "Free/Busy Manager" option, "Template Manager" option, "Custom Inspector Manager" option, "Context Menu Manager" option, "Create new item" option and "About Kayxo Insight" option.

All "...Manager" options do not apply to you as a user – they are configuration options to be used by administrators and they will not be discussed here. The other part of the Kayxo Insight configuration user interface can be accessed in the "Properties" dialog for folders ("KI Configuration" tab).

The "About Kayxo Insight" option enables opening the "About Kayxo Insight" window showing information about the product (version, license, etc.).



**Figure 6**

The "Create new item" option (if enabled) allows adding new items to the folder.

## Inspectors

Kayxo Insight does not offer its own inspectors. Whenever you open (inspect) an item or create a new item (if supported), the Microsoft Outlook inspector is used. It can be a standard Outlook inspector or a custom inspector/form that was specially created for your Kayxo Insight Application. The configuration of Kayxo Insight Application defines which inspector will be used for each type of item.

To learn more about inspectors refer to “Working with... Kayxo Insight Inspectors” chapter.

## Working with...

This chapter contains practical information for Kayxo Insight users. It is divided into parts describing core features of the system.

In many cases, specific examples are presented. They may not exactly match the Kayxo Insight Application that you use. Kayxo Insight is highly configurable and each application can define different Kayxo Insight Store configurations with different Microsoft Outlook views. Inspecting can be implemented in different ways using different custom forms. Therefore, you should treat all examples from this chapter as general guidelines and refer to the additional manuals for your Kayxo Insight Application (if available).

## Kayxo Insight Store folders

The first thing you should do is to get familiar with the store that the Kayxo Insight offers. Locate it in the Microsoft Outlook's folder list (it does not need to be named "Kayxo Insight") and inspect its subfolders.

You must know what all folders within the Kayxo Insight Store represent. Generally there are two possibilities:

1. Typically folders represent so called Business Objects like Companies, Contacts, Projects, etc. But that does not mean that, for example, contents of "Contacts" folder is always contact items. The folders may act as filters (like Search Folders in Outlook). So, in such case, when selecting a folder you view some items that this folder filters for you. For example: selecting "Contacts" folder may show all communication items for contacts (e.g. e-mails).
2. Folders can also be standard message containers (like Microsoft Outlook folders). For example "Orders" folder contains order items (like "Contacts" folder contains contact items in Microsoft Outlook).

It is very important to be aware which type of folder you have. Then you know what you can expect when selecting the folder (what items are shown in Microsoft Outlook view).

Your Kayxo Insight Application may define dynamic folders. In this case you should be aware that a set of dynamic subfolders is not static. It may change when the data that defines these folders change because dynamic folders are created out of information from database. For example: if a folder "Companies" has dynamic Regions subfolders defined, then the number of Region subfolders may be changing as new Companies (located in new regions) are added.

What you can really do with Kayxo Store folders?

- You can select the folder, thus displaying items for this folder in the Microsoft Outlook Explorer view. Selecting a folder is performed exactly the same way as for any other folder in Microsoft Outlook.
- You can create shortcuts for frequently used folders. This is done by using standard Microsoft Outlook functionality (Add New Group, Add New Shortcut).

## Kayxo Insight Outlook Views

Whenever you select a folder within the Kayxo Insight Store, Microsoft Outlook displays data for this folder in the Explorer's View (right side pane). These views behave like standard Microsoft Outlook table views (e.g. Inbox). All the standard operations are supported.

**CUSTOMIZABLE.** The type of data that you inspect in the Explorer's view (items and columns) is defined for you in Kayxo Insight Application configuration.

Frequently, items displayed in Microsoft Outlook views are various communication items. They are usually filtered by the selected folder.

For example, the "Contacts" folder may display all communication items associated with contacts. In this case "a contact" is the business object and, (for example) an "e-mail" is the communication item.

The view typically displays communication items data together with data for the associated business object. The standard (recommended) pattern is "object-verb-subject".

This simple example shows the typical way of displaying communication items in Outlook view:  
 "E-mails for contacts" view displays the following columns:

	Object		Verb	Subject	
Header	Contact Name	Location	Type	E-mail Subject	Date
	John Franklin	New York	send	About your request	2006-03-12
	Frank Johnson	Paris	received	RE: About your request	2006-03-13
	Larry Kent	London	send	Invitation	2006-02-20

**Figure 7**

Each item (row) may be read as the following example: John Franklin from New York sent e-mail on 2006-03-12 entitled "About your request".

What you can do inside the Outlook view?

- You can use standard Microsoft Outlook functionality (sorting, searching, grouping, etc.) to change the way data is displayed.
- You can browse for information.
- You can also open (inspect) items. The inspector that will be used depends on the type of inspected item. In the case of e-mails, it will be the standard Microsoft Outlook inspector. In case of communication items that are not standard in Microsoft Outlook (e.g. faxes), the specialized custom inspectors are used. Refer to "Working with... Kayxo Insight Inspectors" to learn more.
- You can view/operate user controls (if present).
- You can add, edit or delete items (if your application supports these operations)
- You can invoke context menu action (if configured). Refer to "Working with... Kayxo Insight Context Menu Actions" to learn more.

## Kayxo Insight Inspectors

The inspectors that are used to inspect/open items are typically Microsoft Outlook Inspectors. The configuration of Kayxo Insight Application defines which inspector will be used for each type of item.

For opening/inspecting an item, three types of inspectors can be used:

- Standard Outlook inspectors.
- Custom inspectors/forms.
- Custom .Net inspectors

When the standard Microsoft Outlook inspector is used, then the item's data is presented using the form you are already familiar with.

When the custom inspector is used, then the item's data is presented using the form that has been defined by the Kayxo Insight Application being currently used.

**CUSTOMIZABLE.** The custom inspectors are defined by Kayxo Insight Application configuration and may contain various controls and may have sometimes totally different design and functionality compared to standard inspectors.

## Kayxo Insight User Controls

If the view for the folder defines user control(s) then the control(s) are displayed in panels. You can have up to 6 user controls configured for each folder (5 in case of Microsoft Outlook 2003). Typically they are pie charts, graphs, summary reports for the view, etc.

**CUSTOMIZABLE.** The number and type of controls in the Explorer's View is defined for you in Kayxo Insight Application configuration. The controls can be either standard .Net 2.1 controls, or specialized user controls that can read data from the items selected in the view.

The operations that the control allows depend on the control itself. You should refer to the manual for the Kayxo Insight Application that you use (if available). Typically, hovering mouse cursor over the control may trigger the control animation or display additional data. Generally there is no limit to the functionality that the control may offer.

It is also very important to be aware what the control actually shows. Is it a graph or pie chart showing the cumulated statistics for all the items selected in the view; or is it the report for all items displayed in the view. There is unlimited number of possibilities.

In order to effectively use the controls you should answer the following questions:

- What the control shows
- What data is represented in the control (all items in the view, selected items, other information)
- What form/method the control is using to present information (graph, pie chart, table, dialog, etc.)
- What operations the control offers (animation, transformation, scrolling, data input, printout, etc.)

## Kayxo Insight Context Menu Actions

Kayxo Insight Application may offer to users various additional context menu actions. If such actions are configured then item's context menu contains options that can be invoked by users to perform specific tasks, for example changing value of specified property for all selected items.

**CUSTOMIZABLE.** The Context Menu Actions are defined by Kayxo Insight Application configuration and may offer various functionalities. Refer to your Kayxo Application documentation.

Sometimes, you as a user may consider configuring your own context menu action to perform a specific task. In order to do it you should ask your administrator for help or refer to Kayxo Insight programmer's documentation and learn more about configuring such actions.

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