

openCRX GUI - Getting Started

Version 2.5.3



www.opencrx.org

18-Dec-2009 @ 03:12:33 PM

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 2009 © CRIXP Corp. All rights reserved.



Table of Contents

1	About this Book.....	3
1.1	Who this book is for.....	3
1.2	What do you need to understand this book.....	3
1.3	Tips, Warnings, etc.....	3
2	Introduction.....	4
3	Basic Navigation.....	5
4	Inspectors (detailed views of a single Object).....	7
5	Grids (Tabular views of multiple similar objects).....	8
6	Grid Drill Down (detailed view from within a grid).....	9
7	Filtering / Sorting.....	11
7.1	Basic Search in Grids.....	11
7.2	Operators and Wildcards.....	11
7.3	AND Searches.....	12
7.4	OR Searches.....	12
7.5	Combining Searches.....	12
8	PDA / MOBILE GUI.....	13
8.1	How to turn on/off the openCRX MOBILE GUI.....	13
8.2	Basic Navigation / Features.....	13
8.3	Inspectors (detailed views of a single Object).....	14
8.4	Grids (Tabular views of multiple similar Objects).....	14

List of Figures

Figure 1:	Types of openCRX GUIs.....	4
-----------	----------------------------	---

List of Listings

1 About this Book

This book describes the most important elements of the openCRX GUI and how to use it.

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.

1.1 Who this book is for

The intended audience are openCRX users.

1.2 What do you need to understand this book

It is helpful to have a basic understanding of how your browser works, i.e. how to navigate links, how to open pages in a new tab/page, how to close tabs, etc.

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 Introduction

openCRX is distributed with a generic HTML-GUI that connects to the openCRX backend through the API as shown below:

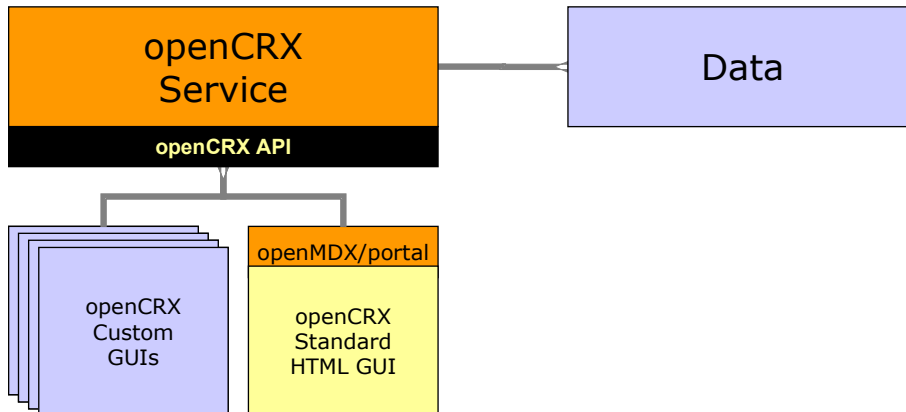


Figure 1: Types of openCRX GUIs

This AJAX-enabled HTML GUI supports a wide range of modern browsers, including Firefox, Opera, Safari, Chrome, KDE Konqueror, and IE, and it also features a PDA mode suitable for devices like the iPhone.

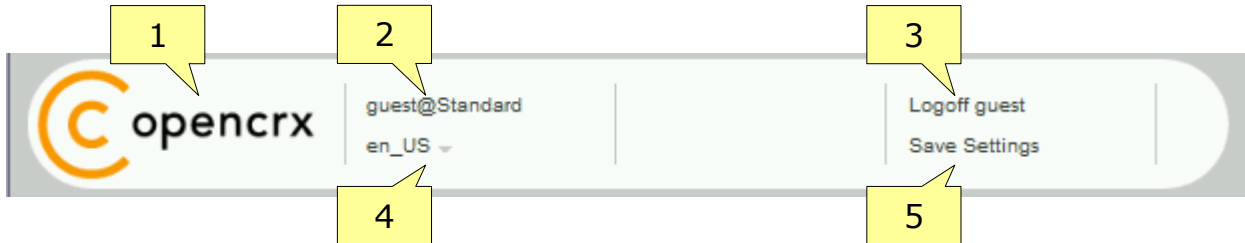
While this generic GUI has its strengths (entirely model-driven, light-weight, open and extensible), it also has its weaknesses (at times it can be hard to understand unless you are familiar with the openCRX UML model). Even though we are continuously enhancing the openCRX GUI, it is still a fact that it is nearly impossible to write a “one size fits all” GUI.

However, consider the following fact: A typical user spends more than 80% of her time on a few screens reflecting the “use cases” this user is dealing with. Such use cases tend to be business-specific and they are typically best handled by highly specialized “screens” (think of a call-center agent or a teller at your bank, where both of them are guaranteed to have very different ideas about what a perfect GUI should look like). The seamless extensibility of the standard GUI with advanced and highly specialized screens is one of its main strengths. Quite often it is sufficient to write a few layout JSPs and some wizards to arrive at an openCRX GUI that covers the most important use cases of your business in a perfect fashion. The openCRX distribution contains a few examples, e.g. wizards to create new contacts or new activities. For additional information, please refer to the openCRX Customizing Guide.

Nevertheless, there are still plenty of other tasks that you can do with the openCRX Standard GUI and this guide will help you getting these things done.

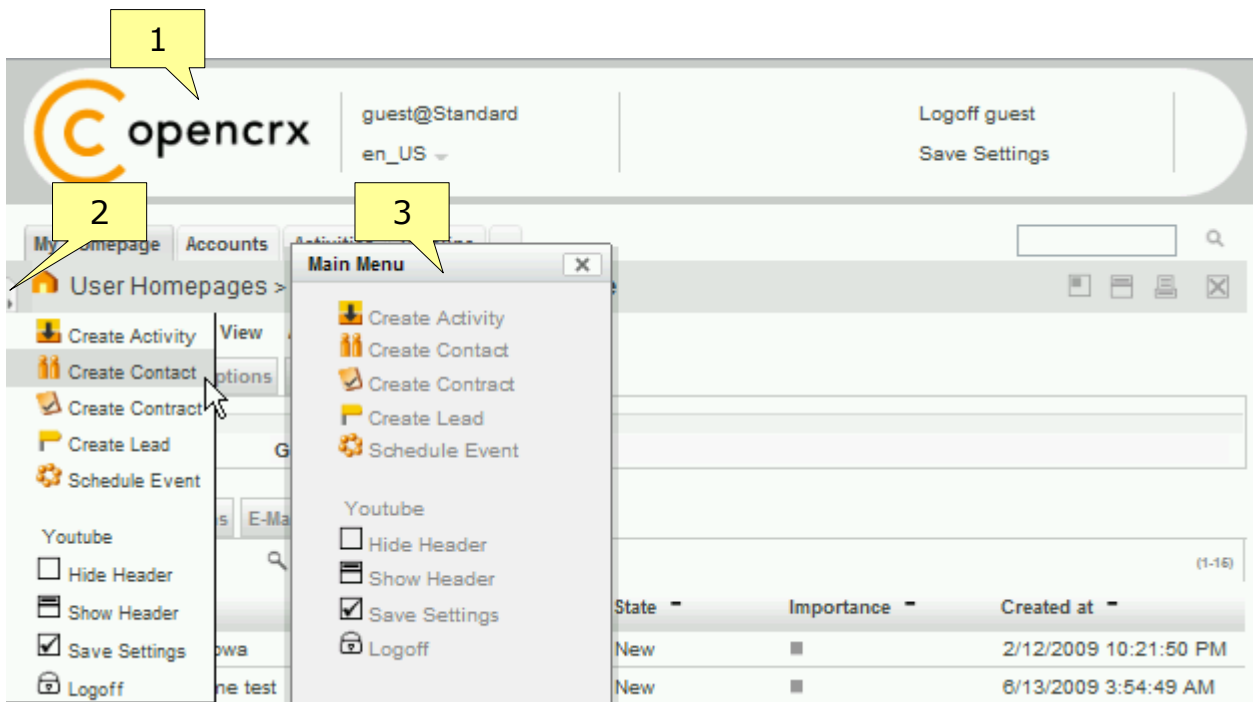
3 Basic Navigation

At the top of the screen you will find the **Header** (unless it is hidden):



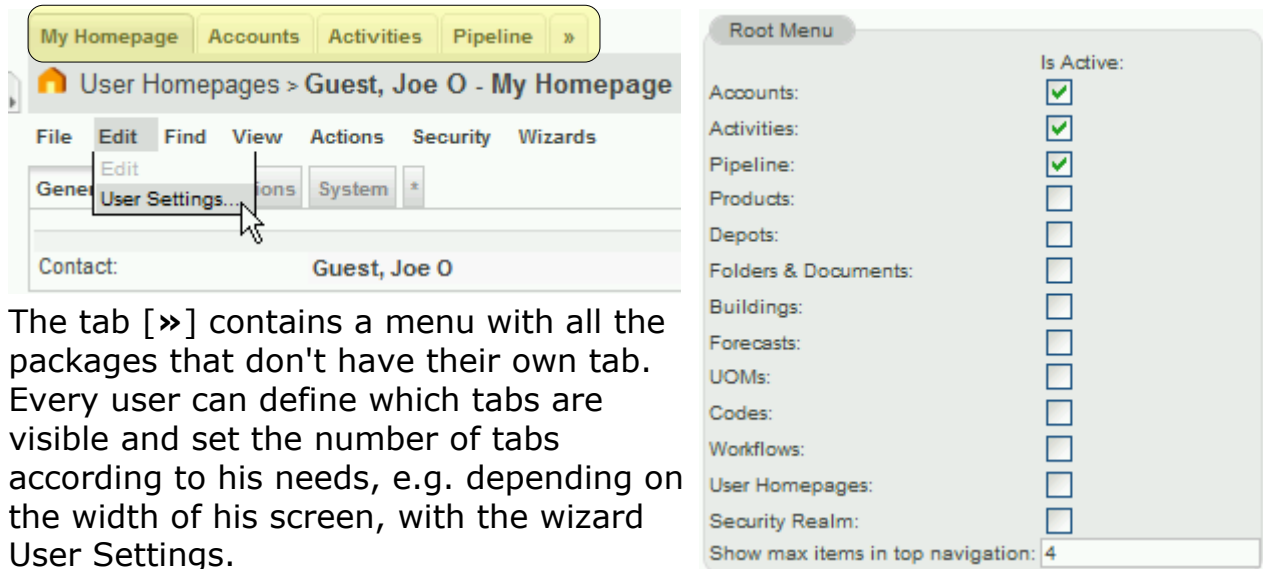
1	logo – click to show main menu (identical to fly-in menu)
2	role of current user – if current use has multiple roles, use drop down to change role
3	current user (= principal) – click to logoff
4	current locale – if multiple locales are enabled, use drop down to change locale
5	click to save current settings as your default settings

The main menu (with favorites and a few essential operations) is accessible in three different ways:



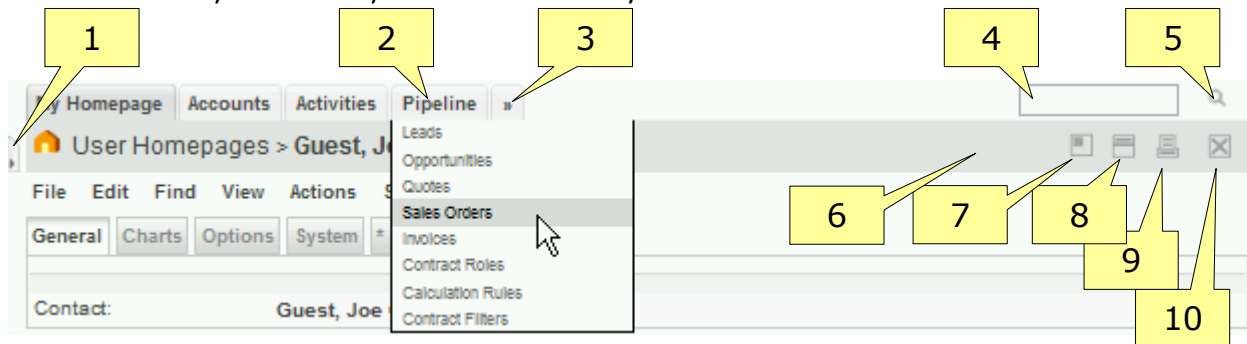
1	click the logo to display main menu
2	hover mouse over flap to show main menu as fly-in
3	hold down <CTRL><ALT> and click with your mouse to display main menu

Use the **top-level tabs** (also called **Root Menu**) to navigate the various openCRX packages (Accounts, Activities, Pipeline, etc.) or to access your homepage from anywhere. Click on a tab to navigate to the respective package. The tab of the current package (e.g. Account) is emphasized:



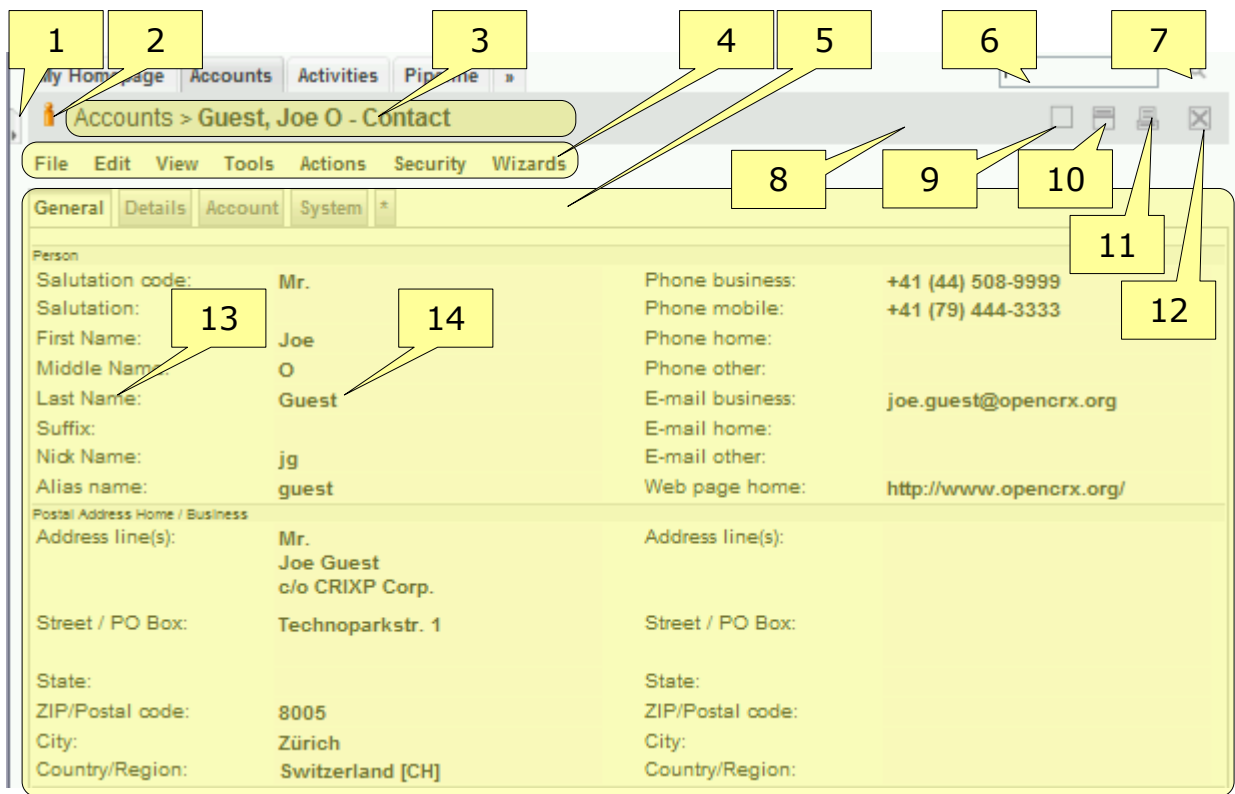
The tab [>>] contains a menu with all the packages that don't have their own tab. Every user can define which tabs are visible and set the number of tabs according to his needs, e.g. depending on the width of his screen, with the wizard User Settings.

Each top-level tab contains a menu with available sub-areas for each package. Hover over any top-level tab to see the respective menu. The tab [Pipeline], for example, contains the following entries: Leads, Opportunities, Quotes, Sales Orders, Invoices, Contract Roles, Calculation Rules and Contract Filters:



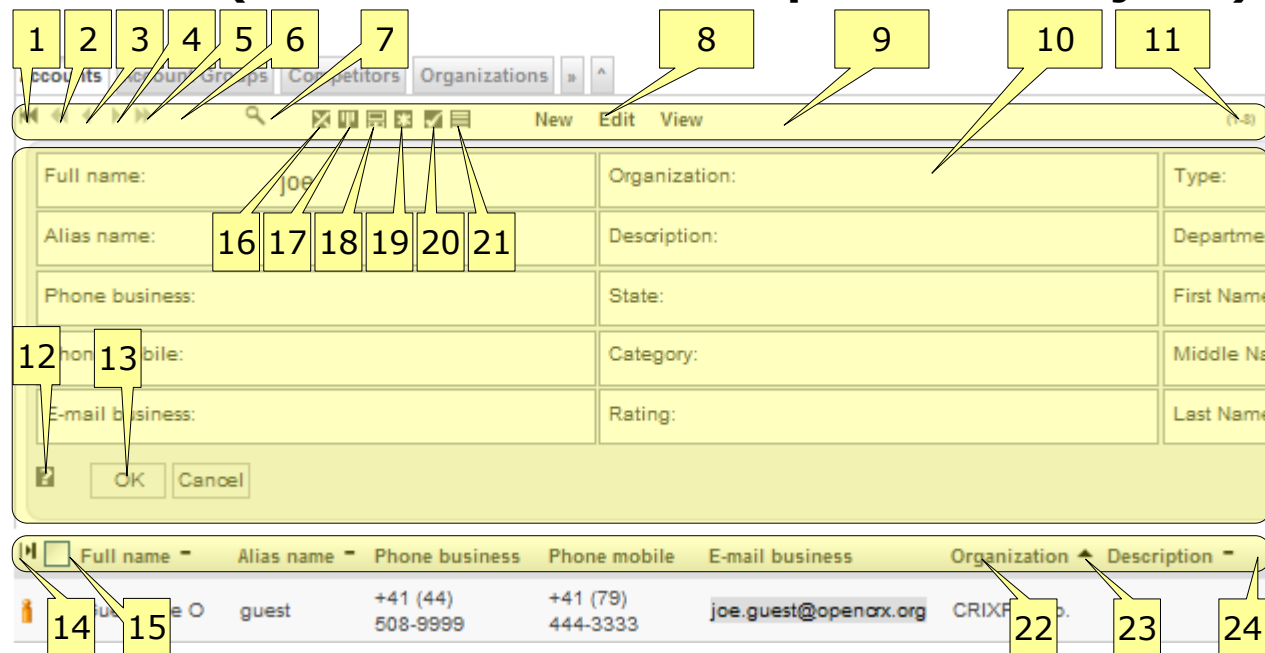
1	fly-in menu – hover mouse over flap to show (menu is identical to main menu)
2	top level tab [Pipeline] with menu for sub-areas
3	top level tab [>>] with menu for additional packages
4	global search input box
5	click icon to start global search
6	click this area to change to PDA/MOBILE GUI
7	perspective changer (drop down menu if multiple perspectives are available)
8	click to hide/unhide header
9	open new browser tab/window and render page printer friendly
10	close current inspector and navigate back to previous object (similar to browser [back])

4 Inspectors (detailed views of a single Object)



1	fly-in menu – hover mouse over flap to show (menu is identical to main menu)
2	icon of current object (e.g. Contact) – click icon to reload object from database
3	bread-crum title showing path of current object (title and type of current object are bold)
4	menu with operations, functions and wizards related to the current object
5	attribute pane showing attributes of current object (structured with tabs and field groups)
6	global search input box
7	click icon to start global search
8	click this area to change to PDA/MOBILE GUI
9	perspective changer (drop down menu if multiple perspectives are available)
10	click to hide/unhide header
11	open new browser tab/window and render page printer friendly
12	close current inspector and navigate back to previous object (similar to browser [back])
13	attribute label
14	attribute value


5 Grids (Tabular views of multiple similar objects)

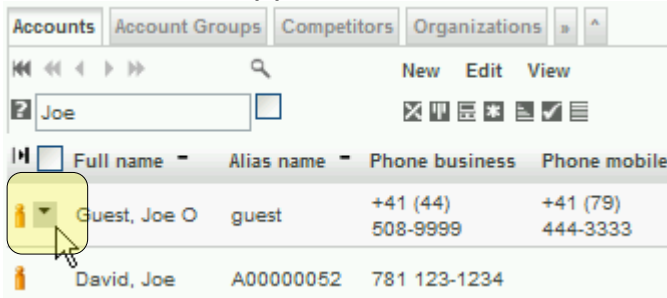


1	pagination – jump to 1 st element
2	pagination – backwards 10 pages (i.e. 10 times page up)
3	pagination – backwards 1 page (i.e. page up)
4	pagination – forward 1 page (i.e. page down)
5	pagination – forward 10 pages (i.e. 10 times page down)
6	pagination – jump to last element
7	lens icon to hide/unhide grid's search form
8	grid's menu
9	grid's paging/filtering/menu area – create/delete objects – set number of objects to show
10	grid's search form
11	range of rows being shown
12	click question mark icon for help with searching and filtering
13	click OK button to start search
14	click to toggle wide/narrow grid layout
15	checkbox to select all rows (click any row to select/deselect row)
16	click to clear all filters
17	activate default filter/sorter
18	class filters (model driven)
19	pre-customized filters (based on xml files)
20	click to set current filter/sorter as default filter/sorter (valid for current session)
21	enable / disable grid
22	column header – if attribute is sortable you can click header to change sorting order
23	sort order indicator – click to change sort order (ascending – descending – unsorted)
24	grid's header row with search and filter buttons

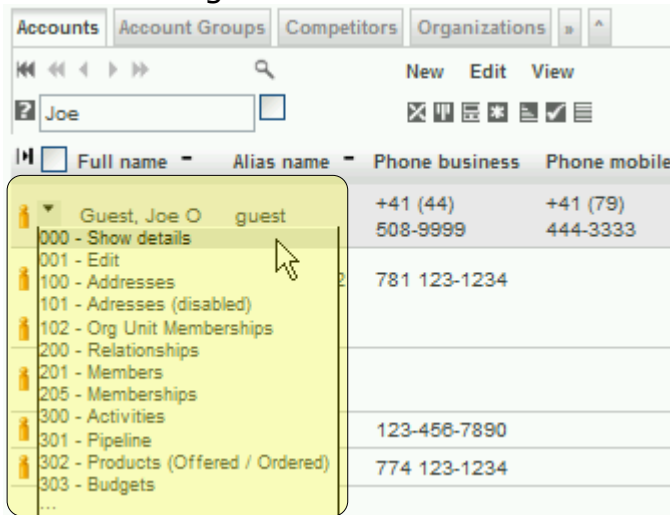
6 Grid Drill Down (detailed view from within a grid)

The grid drill down feature allows you to load an object's detail view inside the grid. You can even edit objects directly inside the grid. Here is how it works:

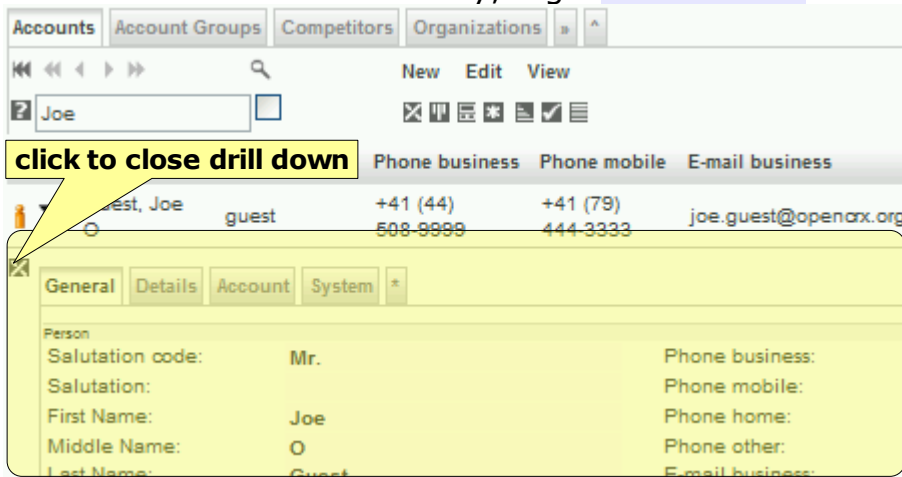
1. Move your mouse just to the right of an object's icon. The grid drill down icon  should appear as follows:




2. Click on the grid drill down icon to show the drill down menu:

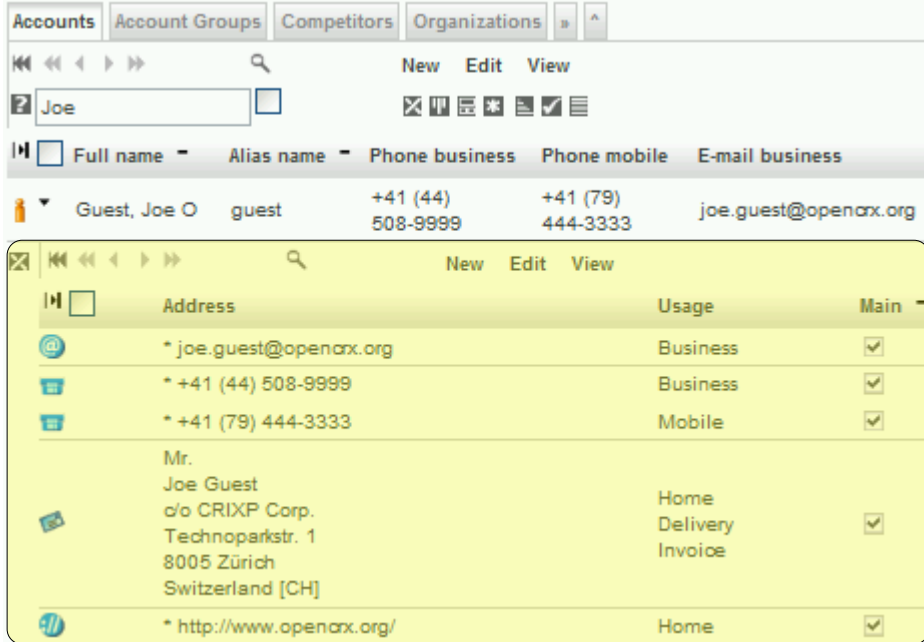


3. Select the desired menu entry, e.g. "Show details":

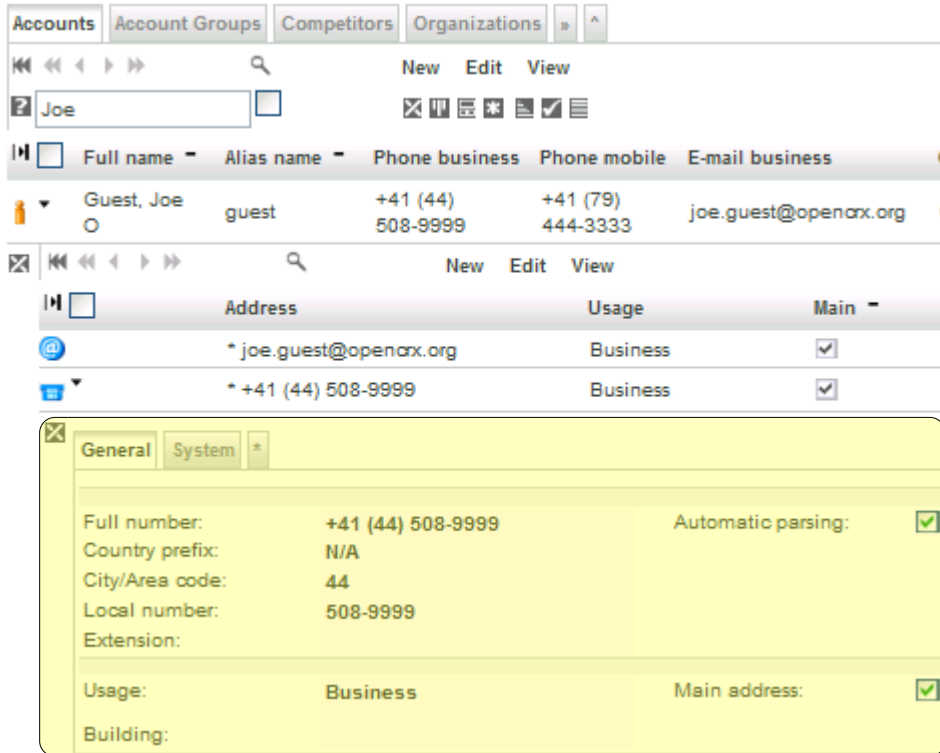


With a click on the icon  you can always close the drill down area.

- Note that with the exception of the two entries "Show details" and "Edit" all entries are model-driven, i.e. they depend on the type of object and on your customizing. Selecting the entry "100 - Addresses", for example, will load the grid [Addresses] of the Contact guest as shown below:



- The drill down feature works recursively, i.e. you can drill down within the grid [Addresses] and load the detail view of an individual address:



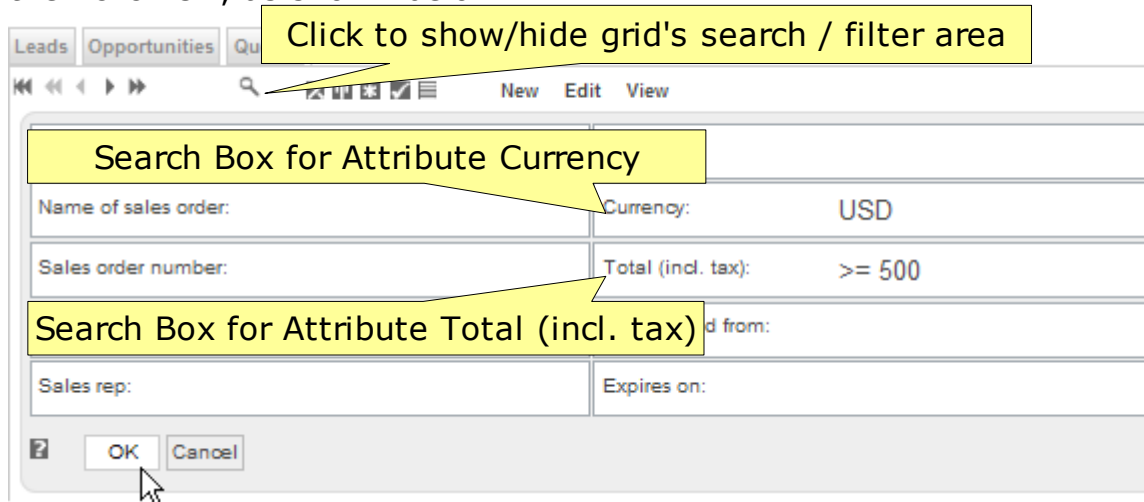
- Close the drill down area with a click on the icon .

7 Filtering / Sorting

In order to efficiently locate data with the openCRX GUI it is helpful to understand the basic concepts of filtering (i.e. focusing on a subset of data, the so-called result set of a filter operation) and sorting (i.e. ordering data).

7.1 Basic Search in Grids

You can search for objects in a grid by entering a value or an expression, e.g. **Doe**, **USD**, **>= 500**, or **<= Jane**, into the respective attribute's search box and then click OK, as shown below:



7.2 Operators and Wildcards

The following wildcards and operators are supported by openCRX (operators must be placed in front of search terms) :

Symbol	Type	Meaning	Example
%	Wildcard	like	M%ller
!%	Wildcard	not like	!%ller
*	Operator	sounds like	*Meier
!*	Operator	not sounds like	!*bang
=	Operator	equal to	=Meyer
!=	Operator	not equal to	!=Meier
<	Operator	less than	<Nano
<=	Operator	less than or equal to	<=Mambo
>	Operator	greater than	>100
>=	Operator	greater than or equal to	>=100



Some database systems do not support all of the above operators and wildcards.

7.3 AND Searches

To find objects that match more than one condition at the same time, use an ampersand "&" between conditions. For example, to search for objects with values between 500 and 1000 (i.e. greater than 500 and less than 1000), enter `>500 & <1000` into the search field.

7.4 OR Searches

To find objects that include either term A or term B, use a semicolon ";" between terms. For example, to search for contacts named 'Smith' OR 'Miller', enter `Smith;Miller` into the search field.

7.5 Combining Searches

You can combine searches virtually without limits. For example, to search for objects with values less than 1000, but different from 500 and different from 600, enter `<>500; 600 & <1000` into the search field.

The parsing rules for combined searches are as follows:

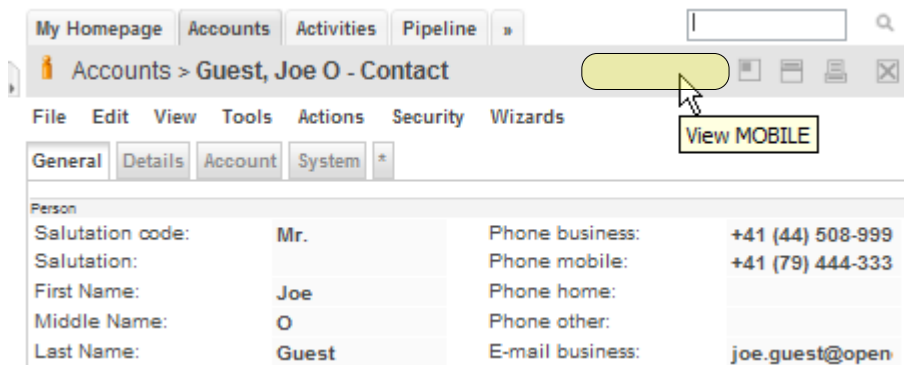
- * searchExpr ::= filterValue { & filterValue }
- * filterValue ::= [operator] value { ; value }

8 PDA / MOBILE GUI

The openCRX MOBILE GUI is optimized for mobile devices (typically featuring smaller screens than desktop or laptop computers).

8.1 How to turn on/off the openCRX MOBILE GUI

If you connect to openCRX with your iPhone the MOBILE GUI mode is activated automatically. With all other devices/browsers you can turn on the openCRX MOBILE GUI by clicking into the area to the left of the perspective changer in the bread-crum title bar, highlighted **yellow** in the following screen shot:



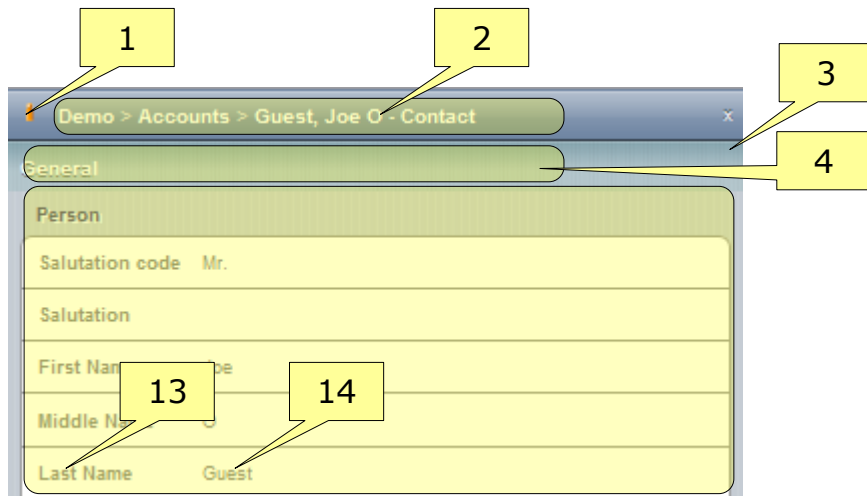
The current view will reload in MOBILE GUI mode. You can switch back to STANDARD GUI mode at any time by clicking into the area to the left of the close button [X] in the bread-crum title bar, again highlighted **yellow** in the following screen shot:



8.2 Basic Navigation / Features

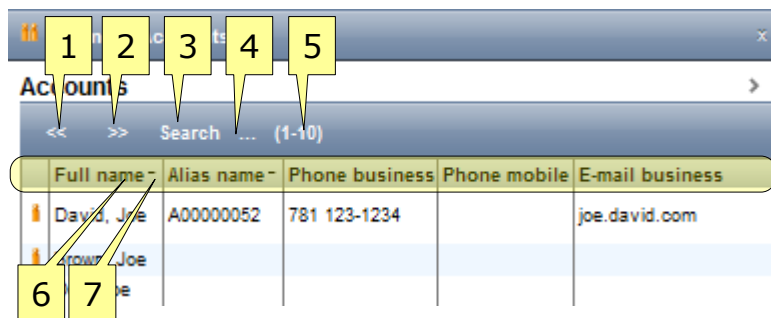
The openCRX MOBILE GUI supports most of the features of the STANDARD GUI, including viewing any object and searching for objects. Some of the more advanced features, including creation of new objects, are available in the STANDARD GUI only. Access such features by switching to STANDARD GUI mode at any time without losing context.

8.3 Inspectors (detailed views of a single Object)



1	icon of current object (e.g. Contact) – click icon to reload object from database
2	bread-crum title showing path of current object (title and type of current object are bold)
3	close current inspector and navigate back to previous object (similar to browser [back])
4	inspector tab (click to collapse/expand tab content)
5	attribute label
6	attribute value

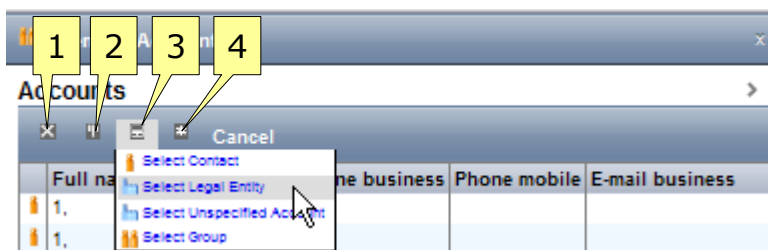
8.4 Grids (Tabular views of multiple similar Objects)



1	paging – backwards 1 page (i.e. page up)
2	paging – forward 1 page (i.e. page down)
3	click/tap [Search] to hide/unhide grid's search form
4	click/tap [...] to hide/unhide grid's filter area
5	range of rows being shown
6	column header – if attribute is sortable you can click header to change sorting order
7	sort order indicator – click to change sort order (ascending – descending – unsorted)

The MOBILE GUI's **search forms** have the same functionality as the search forms of the STANDARD GUI (see chapter 7 Filtering / Sorting):

The MOBILE GUI's **filter area** provides similar functionality as the filter area of the STANDARD GUI:



1	click to clear all filters
2	activate default filter/sorter
3	class filters (model driven)
4	pre-customized filters (based on xml files)