

openCRX GUI - Getting Started

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1 About this Book

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

openCRX is the leading enterprise-class open source CRM service. 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:

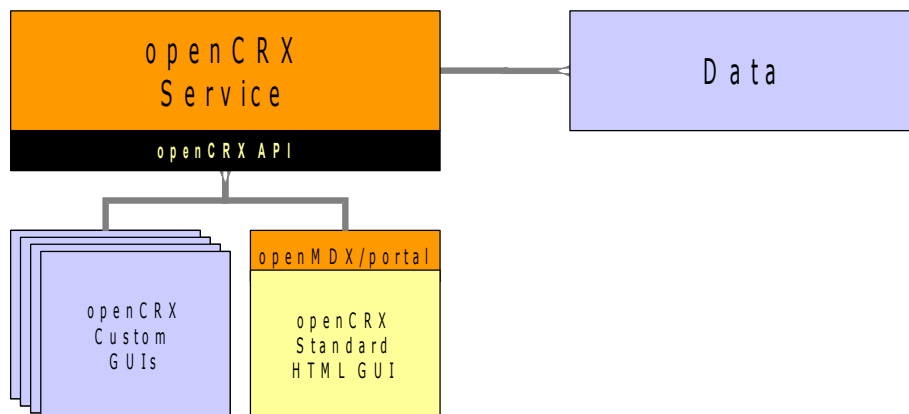


Figure 1: Types of openCRX GUIs

This AJAX-enabled HTML GUI supports a wide range of modern browsers, including Chrome, Firefox, Opera, Safari, IE, etc. and it also features a PDA mode suitable for mobile devices (iPhone, iPad, Android-based devices, etc.).

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). While 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.

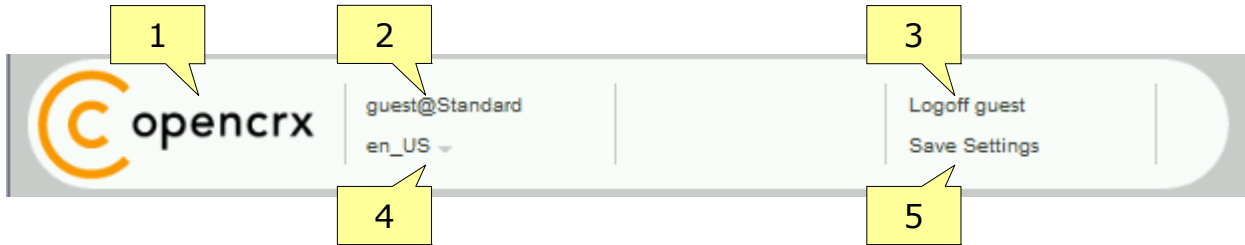
However, consider the following fact: A typical user spends more than 80% of his/her time on a few screens reflecting the “use cases” this user is dealing with. Such use cases tend to be business-specific and they are typically best handled by highly specialized “screens” (think of a call-center agent 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 manage accounts or wizards to create new activities. For additional information, please refer to the openCRX Customizing Guide.

Furthermore, there are various use cases that are best handled with very specialized “GUIs” provided by third-party clients. One example is calendaring. Use a client like Thunderbird (with the Lightning add-on) or your mobile device to view and edit your calendars managed by openCRX.

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.

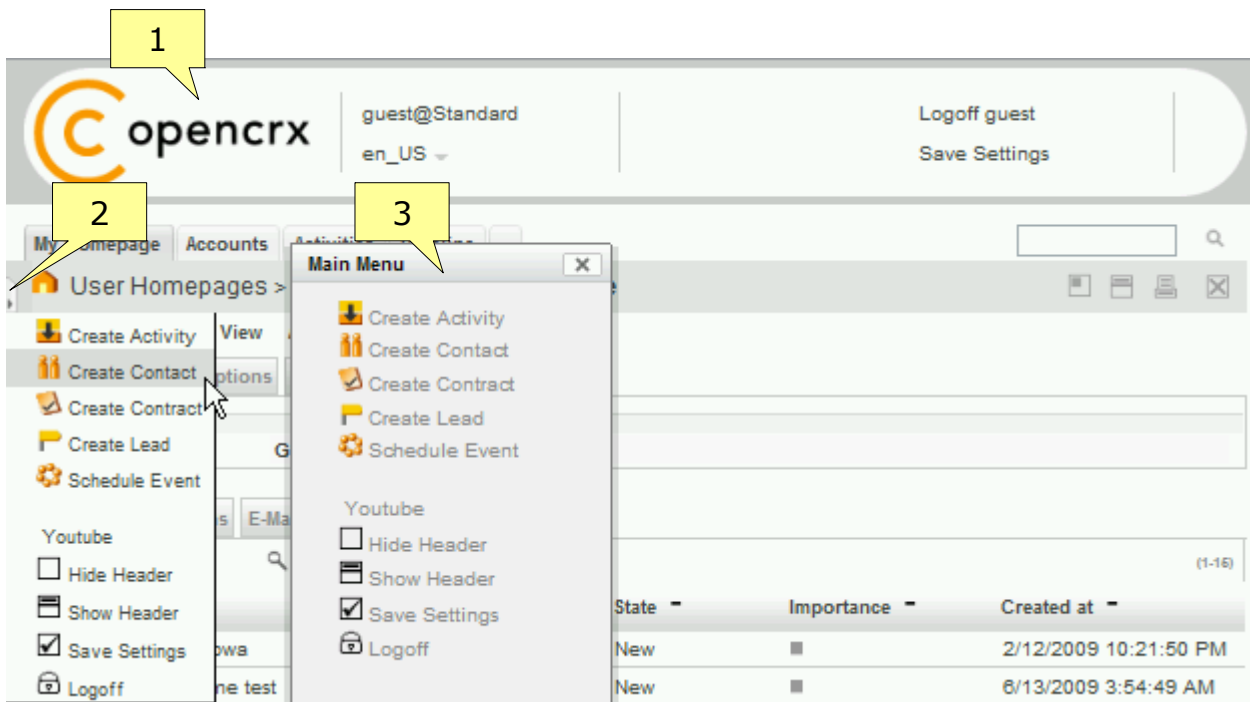
3 Basic Navigation

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



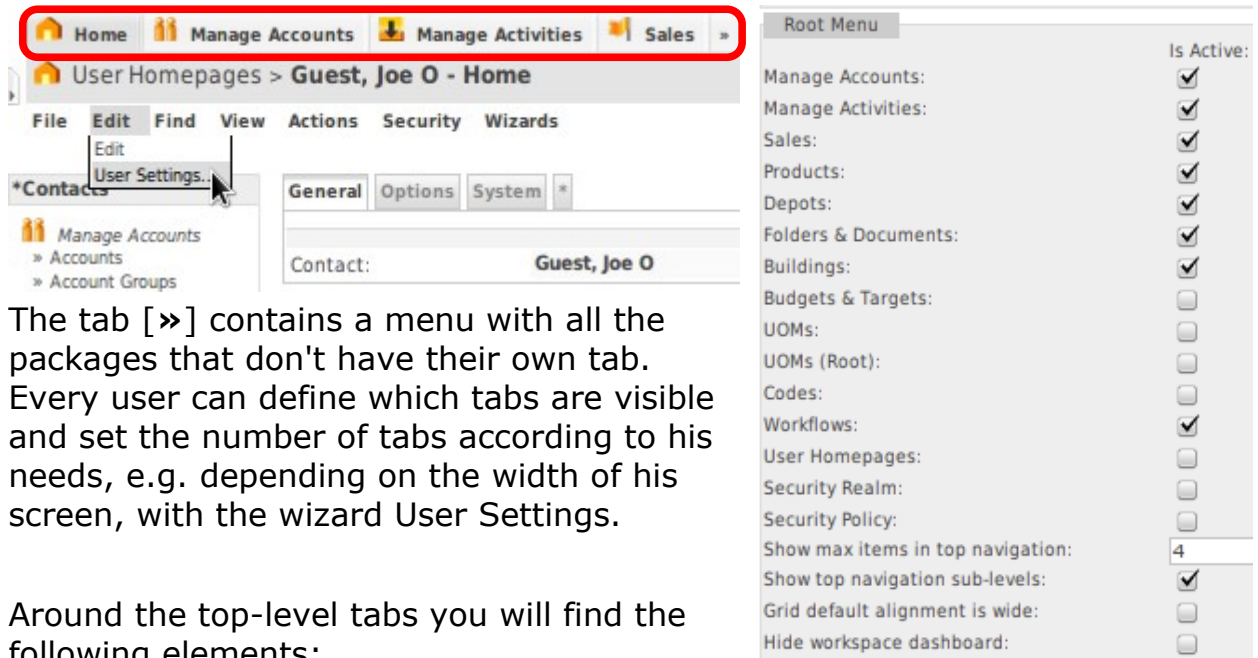
1	logo – click to show main menu (identical to fly-in menu)
2	role of current user – if current use has multiple roles, use drop down to change role
3	current user (= principal) – click to logoff
4	current locale – if multiple locales are enabled, use drop down to change locale
5	click to save current 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 openCRX packages (Manage Accounts, Manage Activities, Sales, 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. Home) is emphasized:



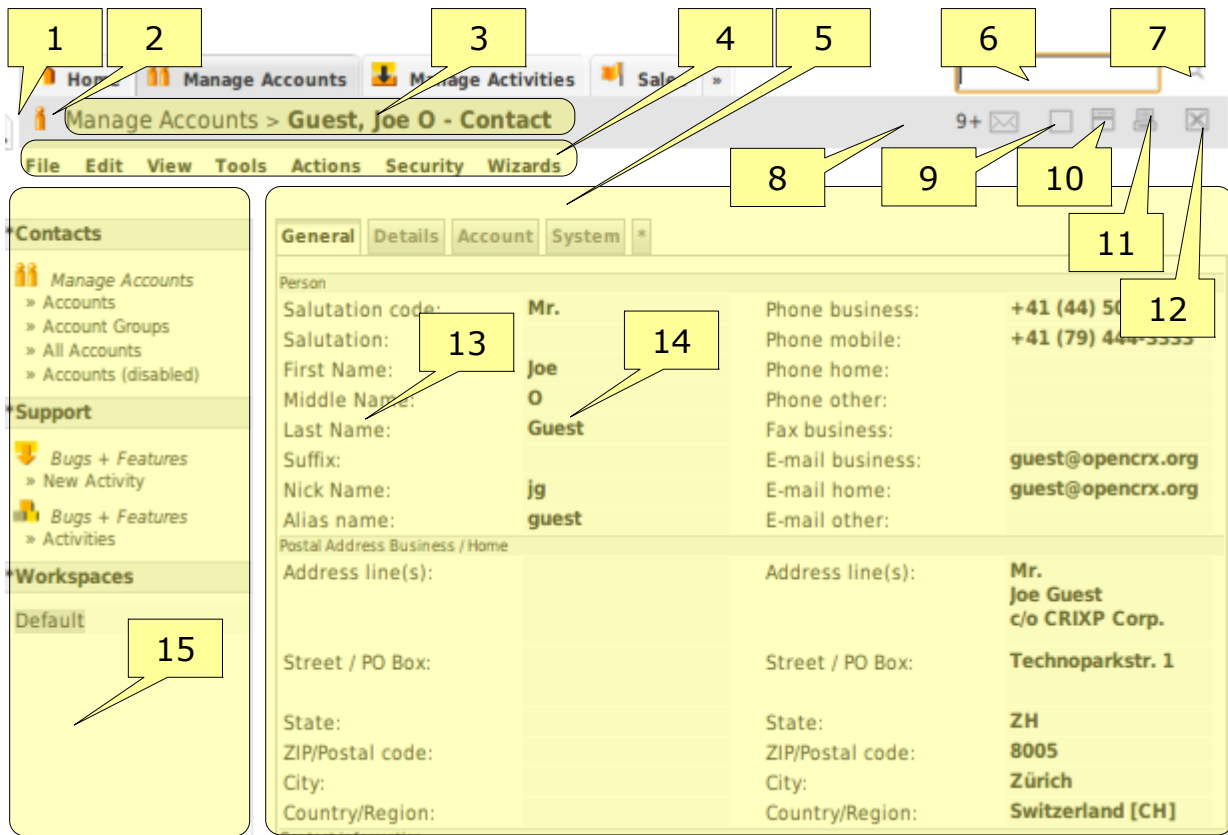
The tab [>>] contains a menu with all the packages that don't have their own tab. Every user can define which tabs are visible and set the number of tabs according to his needs, e.g. depending on the width of his screen, with the wizard User Settings.

Around the top-level tabs you will find the following elements:



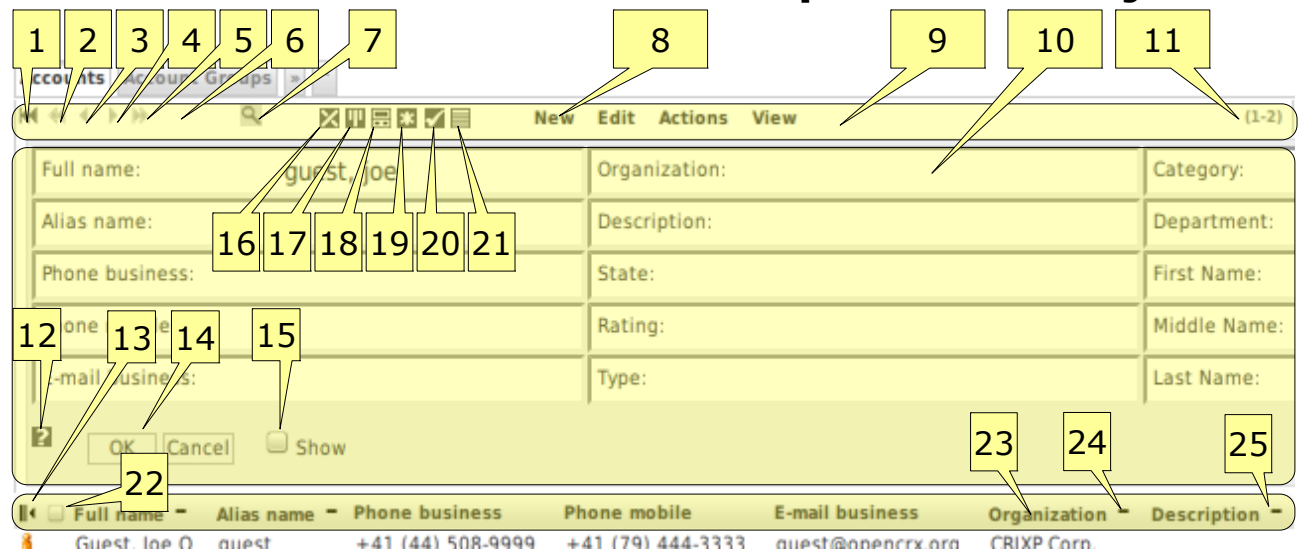
1	fly-in menu – hover mouse over flap to show (menu is identical to main menu)
2	top level tab with package names, e.g. [Manage Activities] – click to open package
3	top level tab [>>] with menu for additional packages – hover mouse to show list
4	global search input box – enter search term or XRI of object to load
5	click looking glass 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 looking glass 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
15	workspace dashboard (can be enabled/disabled in user settings)

5 Grids – tabular views of multiple similar objects



1	paging – jump to 1 st element
2	paging – backwards 10 pages (i.e. 10 times page up)
3	paging – backwards 1 page (i.e. page up)
4	paging – forward 1 page (i.e. page down)
5	paging – forward 10 pages (i.e. 10 times page down)
6	paging – jump to last element
7	looking glass 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 to toggle wide/narrow grid layout
14	click OK button to start search
15	check to always show search form (very useful in combination with disabled grids [21])
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 (very useful in combination with permanently show search form [15])
22	checkbox to select all rows (click any row to select/deselect row)
23	column header – if attribute is sortable you can click header to change sorting order
24	sort order indicator – click to change sort order (ascending – descending – unsorted)
25	grid's header row with sort indicators

6 Grid Landing Page / Search Form

By default grids show 5 lines of information, unsorted and unfiltered:

Product #	Name	Description
WA-1000 T1	Widget A T1Tt	
0001-0009---45ABF	A really nice widget	Beautifully designed and built.
WAZQ-1000	Widget Azq	LARGE PRODUCT
WX-1234	Widget X	
0011111111	Widget1	First class Widget


Often times, users prefer to see a search form instead of “random” data. Here are the steps to customize the grid landing page so that a search form is displayed default:

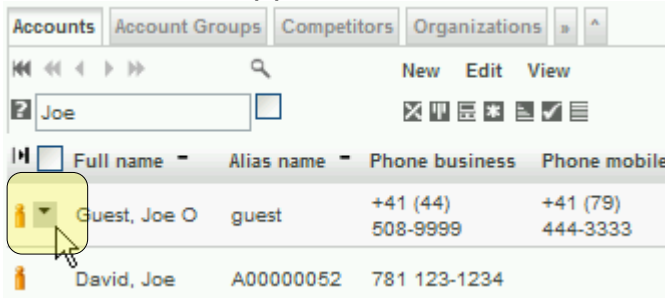
- step 1: click on the looking glass icon to unhide the grid's search form
- step 2: check the “Show” box in the search form
- step 3: click the button [OK] in the search form
- step 4: click on the icon “disable grid” (should show ☒, not ☐)
- step 5: Save settings (to persist setting beyond logoff/logon cycle)

The screenshot shows the openCRX GUI interface. At the top, there is a user profile section with the openCRX logo, the user email 'guest@Standard', and the language 'en_US'. To the right, there are buttons for 'Logoff guest' and 'Save Settings', with a callout 'step 5' pointing to 'Save Settings'. Below this is a navigation bar with icons for Home, Manage Accounts, Manage Activities, Sales, Products, and Depots. The main content area shows the 'Products' grid. The grid's search form is open, displaying fields for Product #, Name, Description, Active/Valid from, Expires on, Version, Is stock Item, Alternate product #, Product Dimension, and Gross Weight Kilogram. The search form has an 'OK' button, a 'Cancel' button, and a 'Show' checkbox which is checked. Callouts indicate the steps: 'step 1' points to the looking glass icon in the grid toolbar, 'step 2' points to the 'Show' checkbox, 'step 3' points to the 'OK' button, and 'step 4' points to the 'disable grid' icon (a square with an 'X') in the toolbar.

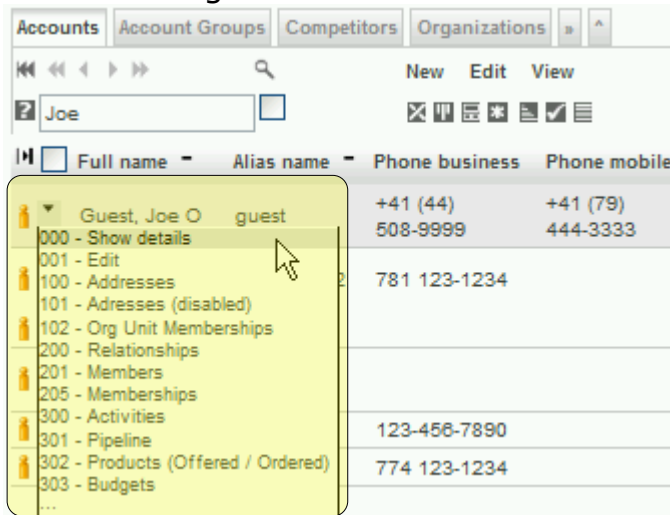
7 Grid Drill Down (detailed view from within a grid)

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:

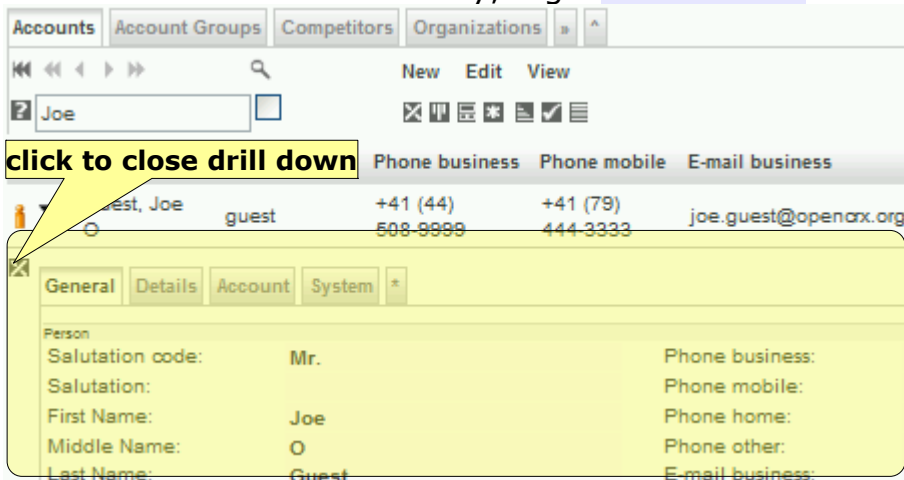
1. Move your mouse just to the right of an object's icon. The grid drill down icon  should appear as follows:




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.

4. 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 screenshot shows the openCRX GUI interface. At the top, there are tabs for 'Accounts', 'Account Groups', 'Competitors', and 'Organizations'. Below the tabs is a search bar containing 'Joe' and a set of navigation icons. The main grid displays contact information for 'Guest, Joe O' with columns for 'Full name', 'Alias name', 'Phone business', 'Phone mobile', and 'E-mail business'. A secondary grid, titled 'Addresses', is displayed below the main grid, showing a list of addresses for the selected contact. The 'Addresses' grid has columns for 'Address', 'Usage', and 'Main'. The addresses listed are:

Address	Usage	Main
* joe.guest@openox.org	Business	<input checked="" type="checkbox"/>
* +41 (44) 508-9999	Business	<input checked="" type="checkbox"/>
* +41 (79) 444-3333	Mobile	<input checked="" type="checkbox"/>
Mr. Joe Guest c/o CRIXP Corp. Technoparkstr. 1 8005 Zürich Switzerland [CH]	Home Delivery Invoice	<input checked="" type="checkbox"/>
* http://www.openox.org/	Home	<input checked="" type="checkbox"/>

5. 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:

The screenshot shows the openCRX GUI interface. At the top, there are tabs for 'Accounts', 'Account Groups', 'Competitors', and 'Organizations'. Below the tabs is a search bar containing 'Joe' and a set of navigation icons. The main grid displays contact information for 'Guest, Joe O' with columns for 'Full name', 'Alias name', 'Phone business', 'Phone mobile', and 'E-mail business'. A secondary grid, titled 'Addresses', is displayed below the main grid, showing a list of addresses for the selected contact. The 'Addresses' grid has columns for 'Address', 'Usage', and 'Main'. The address selected is '* +41 (44) 508-9999'. A detail view for this address is displayed below the 'Addresses' grid, showing the following information:

General		System	
Full number:	+41 (44) 508-9999	Automatic parsing:	<input checked="" type="checkbox"/>
Country prefix:	N/A		
City/Area code:	44		
Local number:	508-9999		
Extension:			
Usage:	Business	Main address:	<input checked="" type="checkbox"/>
Building:			

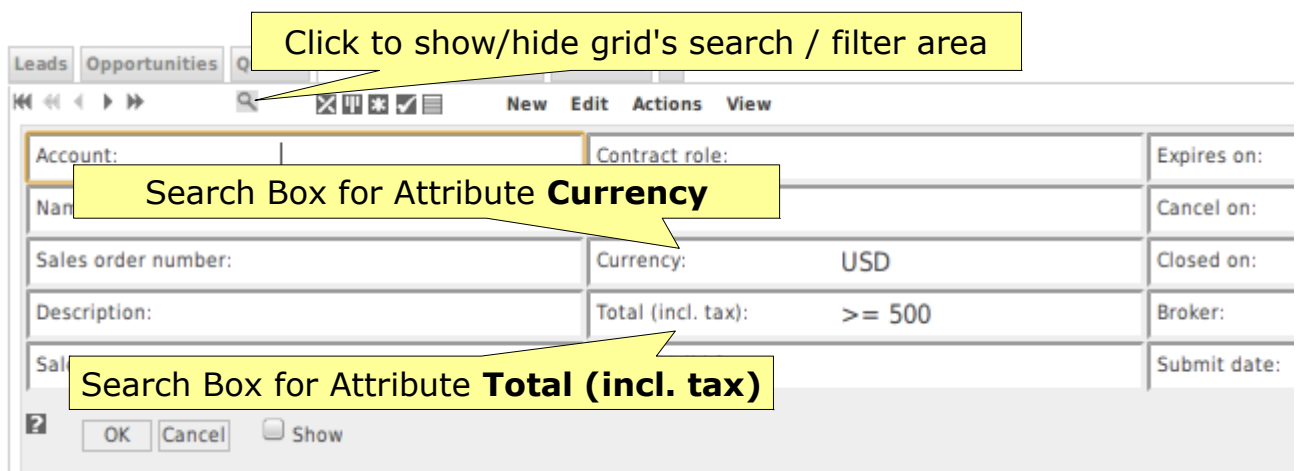
6. Close the drill down area with a click on the icon .

8 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).

8.1 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:



8.2 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	does not sound 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.

8.3 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.

8.4 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.

8.5 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 }

9 Customizing the GUI

The openCRX Standard GUI is very customizable. Some customizing options (e.g. selection and arrangement of an object's attributes) are only available to administrators (see <http://www.opencrx.org/documents.htm> for details), others are available to every openCRX user.

9.1 User Settings

With the help of the wizard User Settings you can modify various settings, for example:

- enable/disable packages like Manage Accounts, Manage Activities, etc. (see chapter 3 Basic Navigation); you can individually do this for the perspectives Root, Advanced and Simple to support different working modes
- decrease (increase) the number of items shown in top navigation for narrow (wide) screens (see chapter 3 Basic Navigation)
- set the grid default alignment to wide or narrow (see chapter 5 Grids – tabular views of multiple similar objects)
- hide/show the workspace dashboard

User Home

Timezone: Europe/Zurich

Timezone: Europe/Zurich

Store settings on logoff:

Email: joe.guest@opencrx.org

Sendmail subject prefix: [CRX:Standard]

Web access URL: http://demo.opencrx.org/opencrx-core-CRX

Root Menu

	Root	Advanced	Simple
Manage Accounts:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Manage Activities:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sales:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Products:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Depots:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Folders & Documents:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Buildings:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Budgets & Targets:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UOMs:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
UOMs (Root):	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Codes:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Workflows:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User Homepages:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Security Realm:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Security Policy:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show max items in top navigation:	4		
Show top navigation sub-levels:	<input checked="" type="checkbox"/>		
Grid default alignment is wide:	<input checked="" type="checkbox"/>		
Hide workspace dashboard:	<input type="checkbox"/>		
Scroll header:	<input type="checkbox"/>		

Save Close

Subscriptions

	Is Active	Creation	Notify on	
			Replacement	Removal
Account Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Follow Up Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activity Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alert Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alert Modifications (Jabber):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alert Modifications (Twitter):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booking Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Competitor Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Compound Booking Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lead Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Opportunity Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Organization Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Product Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quote Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reminder Modifications (Alert):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SalesOrder Modifications:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timer Modifications (Alert):	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9.2 Favorites

The main menu, which is also available as fly-in menu (see chapter 3 Basic Navigation) can contain shortcuts to important or frequently used objects. You can create a shortcut with the following steps:

- navigate to your home page
- expand the grid panel [Alerts] [Reminders] [»] [^] by clicking on the expansion tab [»]
- click on the now visible tab [Favorites]
- normal users will see an empty grid, administrators will see the default favorites set by the wizard "Segment Setup":

Reference -	Name -
★ Manage Activities	Create Activity
★ Manage Accounts	Create Contact
★ Sales	Create Contract
★ Sales	Create Lead
★ Manage Activities	Schedule Event

- select the grid menu **New > Favorite** to load a form that allows you to define a new favorite:

Untitled - Favorite

General System *

Reference:

Name:

Description:

- click on the looking glass icon to the right of the input field labelled "Reference" to open the lookup inspector; navigate to the object the new favorite/shortcut should reference (point to) and then click the respective checkbox to get the reference:

Home Manage Accounts Manage Activities Sales

Products Depots Folders & Documents »

Manage Accounts

File Edit View Actions Security Wizards

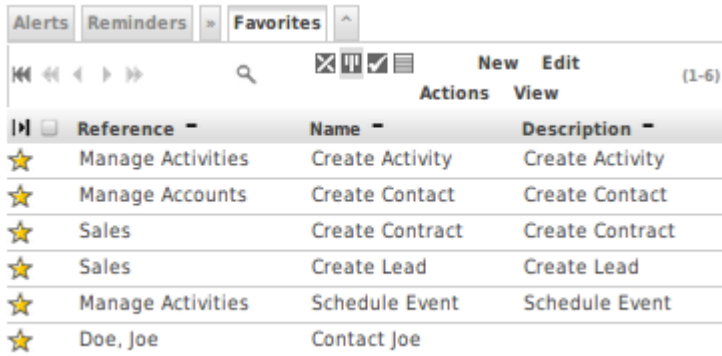
*Workspaces

Default

Accounts Account Groups ^

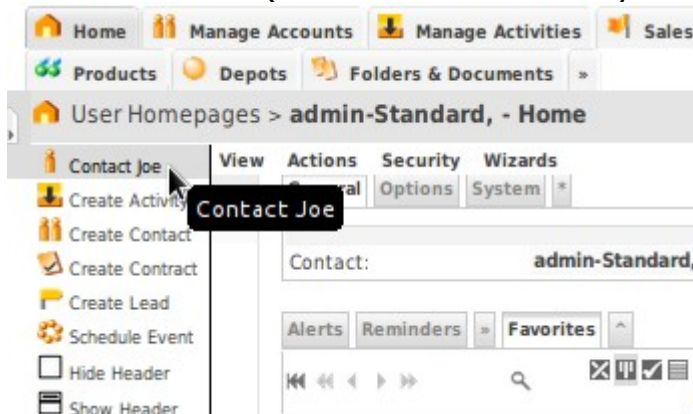
Full name -	Alias name -	Phone business	Phone mobile	E-mail bu
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				
Doe, Joe				

- back in the form the content of the field "Reference" has been set automatically
- enter the name of your favorite, e.g. **Contact Joe**
- enter the name of an icon, e.g. Contact.gif
- click the button **[Save]** to create the favorite:



Reference	Name	Description
★ Manage Activities	Create Activity	Create Activity
★ Manage Accounts	Create Contact	Create Contact
★ Sales	Create Contract	Create Contract
★ Sales	Create Lead	Create Lead
★ Manage Activities	Schedule Event	Schedule Event
★ Doe, Joe	Contact Joe	

- reload the page and then verify that the new favorite is also available in the main menu (shown below is the fly-in menu):



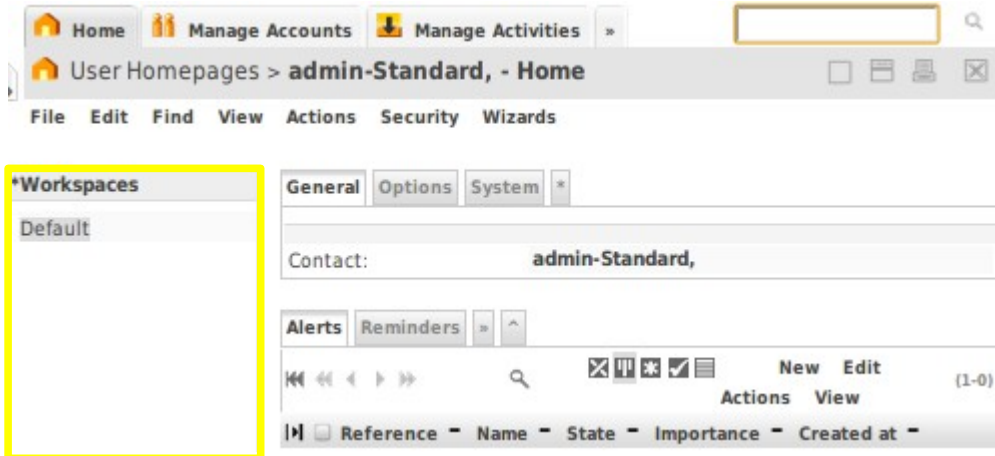
Favorites defined by segment administrators (e.g. admin-Standard) are available to all users.

With the following steps you can delete favorites:

- navigate to your home page
- expand the grid panel **[Alerts]** **[Reminders]** **[>>]** **[^]** by clicking on the expansion tab **[>>]**
- click on the now visible tab **[Favorites]**
- click on the icon of the favorite you want to delete
- select the menu **Edit > Delete** and confirm by clicking **[OK]**

9.3 Workspace Dashboard

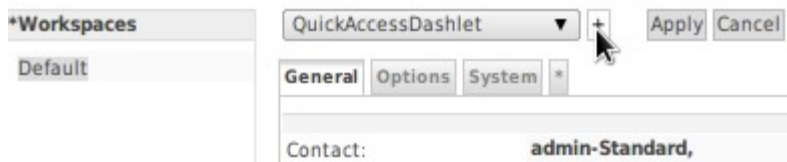
The workspace dashboard is an area on the left-hand side of the screen that you can populate with various dashlets:



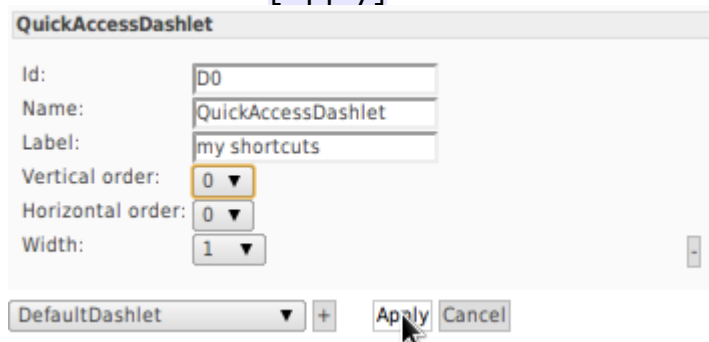
With the wizard User Settings you can hide/show the workspace dashboard (see chapter 9.1 User Settings).

Select the menu **Wizards > Manage Workspace Dashboard** to start this wizard that allows you to manage the workspace dashboard. With the following steps you can add a QuickAccessDashlet to the workspace dashboard and configure it:

- select "QuickAccessDashlet" from the select box and then click the button [+] to add it to the workspace dashboard:

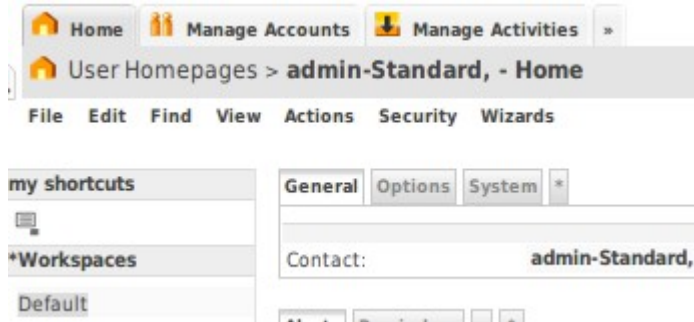


- enter the label, e.g. "my shortcuts" into the respective field
- optionally, set vertical/horizontal order and the width
- click the button [Apply] to save the current configuration:



- click the button [Cancel] to leave the wizard

- now you should see the newly added dashlet “my shortcuts” in the workspace dashboard:



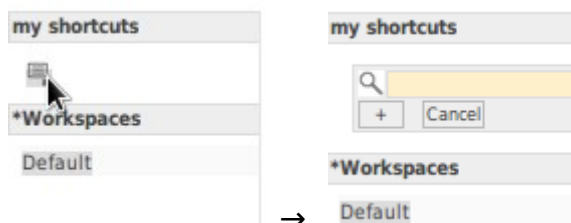
Click [Save Settings] in the header to save these changes (otherwise changes to your workspace dashboard will be lost after you log out).



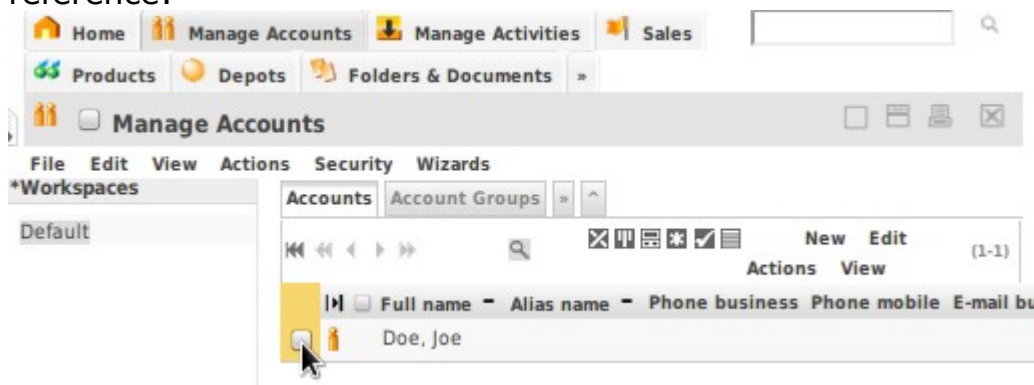
Dashlets defined by segment administrators (e.g. admin-Standard) can optionally be made available to all users if the label starts with the star-character “*”.

With the following steps you can add shortcuts to the QuickAccessDashlet:

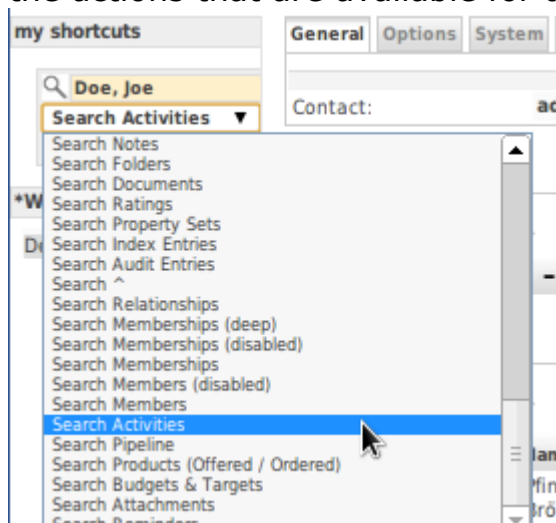
- click on the icon at the bottom of the dashlet to enter edit mode:



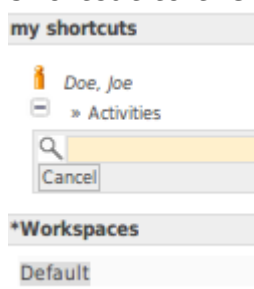
- click on the looking glass icon to the left of the colored input field to open the lookup inspector; navigate to the object the new shortcut should reference (point to) and then click the respective checkbox to get the reference:



- back in the dashlet the content of the colored field has been set automatically and the select box right underneath is populated with all the actions that are available for the selected object:



- select the desired action and then click the button **[+]** to add the shortcut to the dashlet:



- if you want to remove a shortcut, simply click on the button **[-]** to the left of the shortcut
- if you're done with adding/removing shortcuts you can leave the edit mode by clicking on the button **[Cancel]**

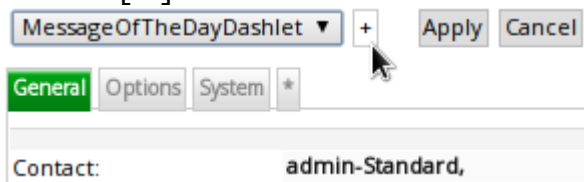


Click **[Save Settings]** in the header to save these changes (otherwise changes to your workspace dashboard will be lost after you log out).

9.4 Message of the day

openCRX features a MessageOfTheDayDashlet that you can add to the Workspace Dashboard (displayed on all openCRX pages) or the Dashboard of a particular page. With the following steps the segment administrator (e.g. admin-Standard) can add a message of the day to every user's homepage:

- login as admin-Standard (or navigate to the userhome if you're already logged in...)
- select the menu **Wizards > Manage Dashboard** to start this wizard that allows you to manage the dashboard
- select "MessageOfTheDayDashlet" from the select box and then click the button [+] to add it to the dashboard:



- enter the label, e.g. "*Today's motto" into the respective field

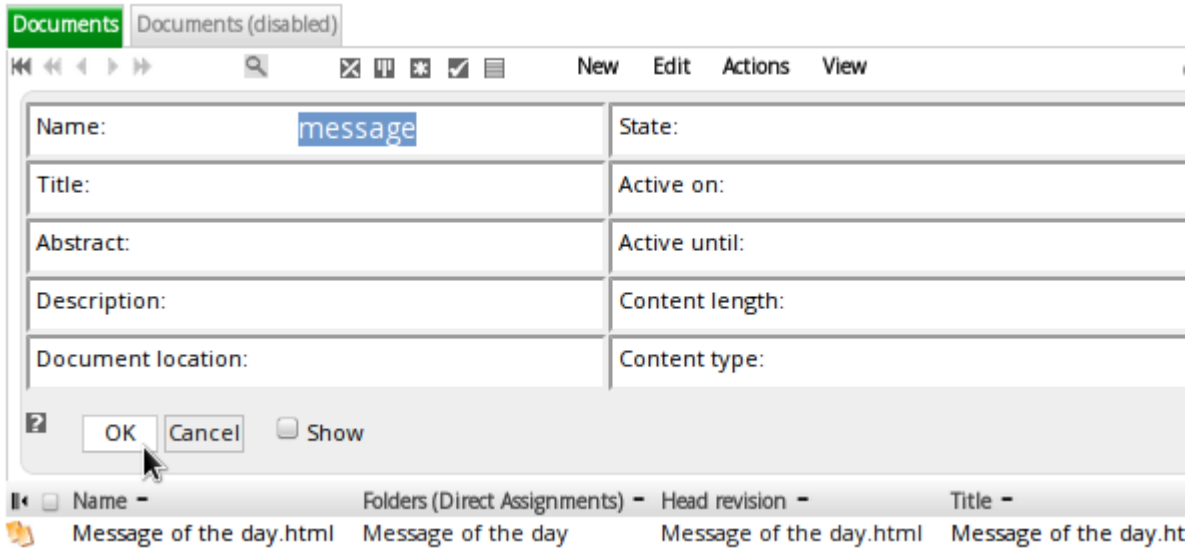


The message is made available to all users if the label starts with the star-character "*".

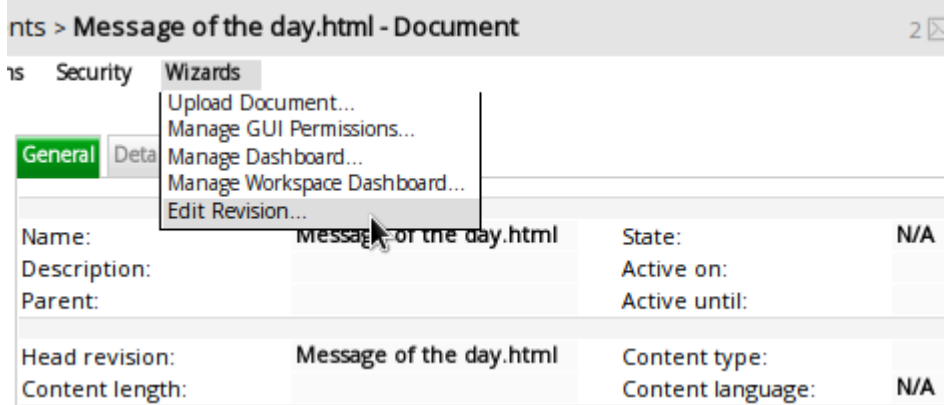
- optionally, set vertical/horizontal order and the width
- click the button [Apply] to save the current configuration:

- click the button [Cancel] to leave the wizard
- don't forget to save these settings by clicking on [Save Settings] in the header; otherwise the dashboard configuration will be lost once you logout...
- now we still need to set the message; navigate to [Folders & Documents]

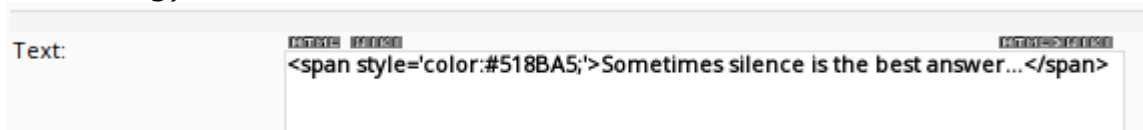
- locate the document "Message of the day.html" (e.g. by searching for "document" as shown below):



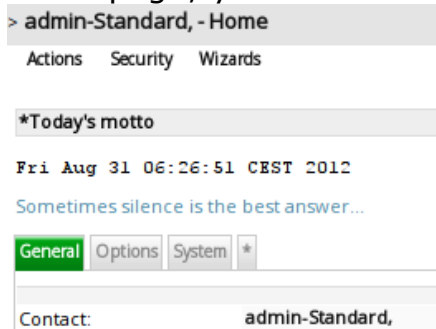
- load the document (click the icon) and select **Wizards > Edit Revision:**



- now you can enter your message of the day (use proper HTML to add formatting) into the field Text:



- click the button [OK] once you're done and then navigate back to the home page; you should see the message of the day:



Any openCRX user with permission to update the document "Message of the day.html" can manage/change the message with the following steps:

- login and navigate to [Folders & Documents]
- locate and load the document "Message of the day.html"
- select **Wizards > Edit Revision:**
- enter a new message of the day (use proper HTML to add formatting) into the field Text:

Text:

- click the button [OK] once you're done and then navigate back to the home page; you should see the new/updated message of the day:

> admin-Standard, - Home

Actions Security Wizards

*Today's motto

Fri Aug 31 06:44:02 CEST 2012

Just speak up!

General Options System *

Contact: admin-Standard,



Tip

In case other user's don't see the message of the day you might want to verify the label of the dashlet – it is important that the label starts with the star-character "*".

9.5 GUI Permissions

Once the root administrator (admin-Root) has defined a security policy, segment administrators can grant revoke various GUI-level permissions (see openCRX Admin Guide at <http://www.opencrx.org/documents.htm>).

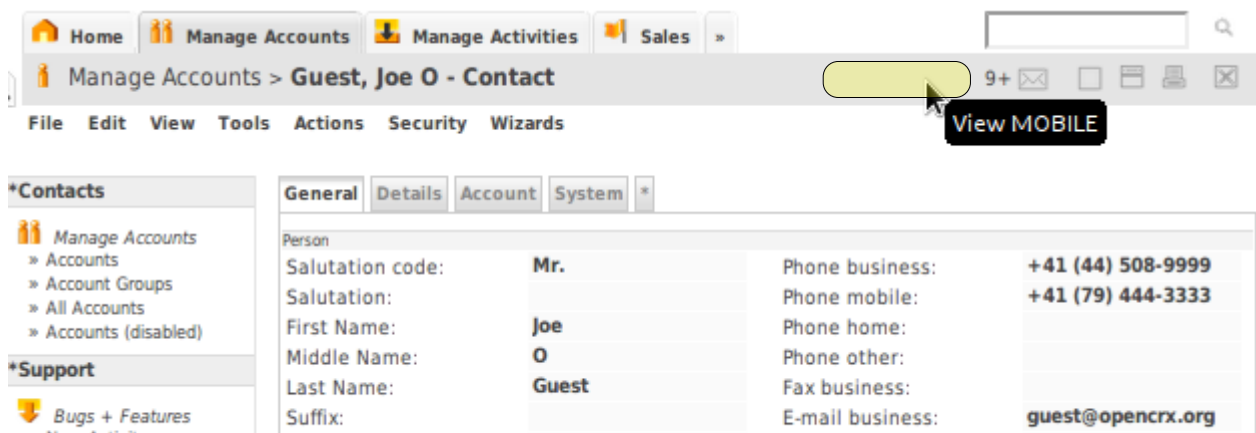
The wizard "Manage GUI Permissions" makes this task very easy.

10 PDA / MOBILE GUI

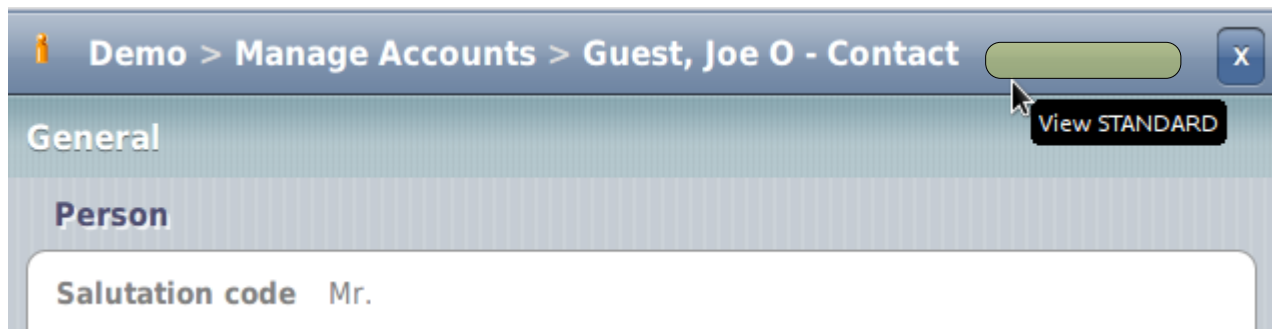
The openCRX MOBILE GUI is optimized for mobile devices (typically featuring smaller screens than desktop or laptop computers).

10.1 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:



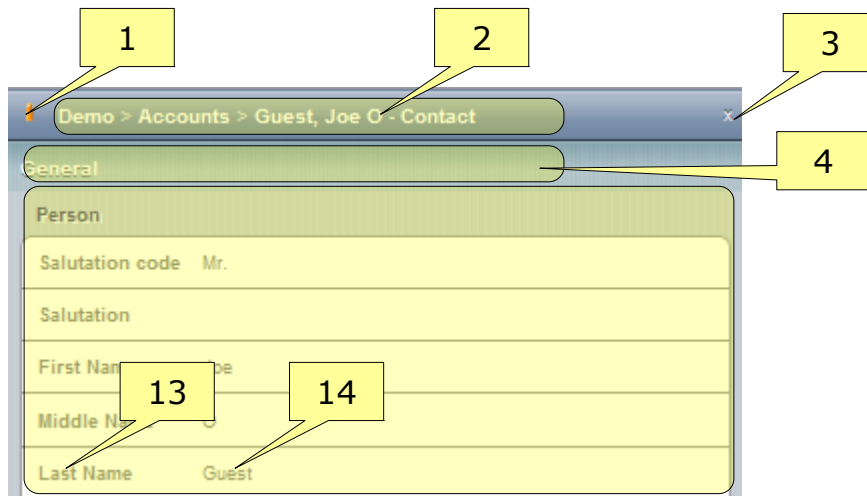
The current view will reload in MOBILE GUI mode. You can switch back to STANDARD GUI mode at any time by clicking into the area to the left of the close button [X] in the bread-crum title bar, again highlighted **yellow** in the following screen shot:



10.2 Basic Navigation / Features

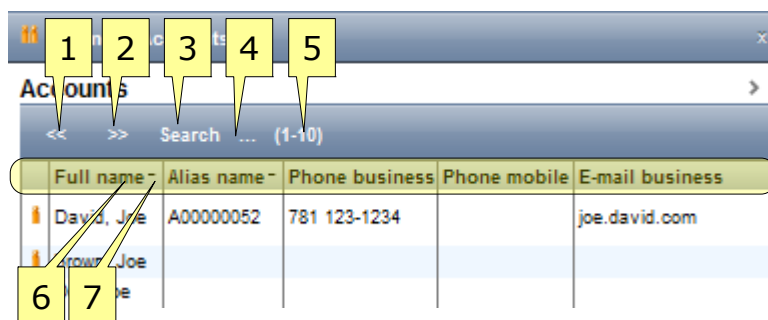
The openCRX MOBILE GUI supports most of the features of the STANDARD GUI, including viewing any object and searching for objects. Some of the more advanced features, including creation and updating of new objects, are available in the STANDARD GUI only. Access such features by switching to STANDARD GUI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

10.3 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

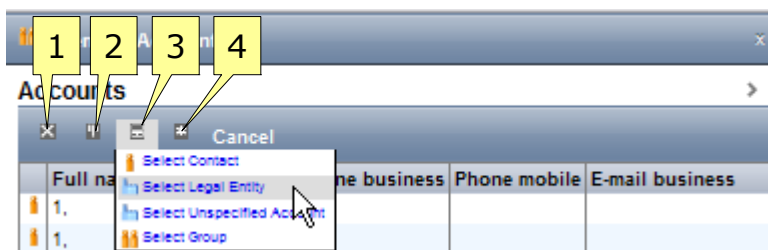
10.4 Grids (Tabular views of multiple similar Objects)



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 8 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)