openCRX GUI - Getting Started

Version 2.9.1

www.opencrx.org

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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 of 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*:
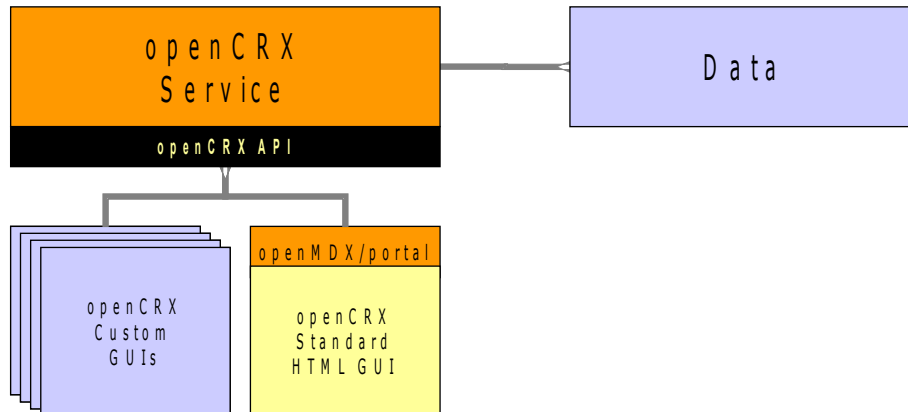> Extremely or excessively careful about details.

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 devices like the iPhone or Android-based phones.

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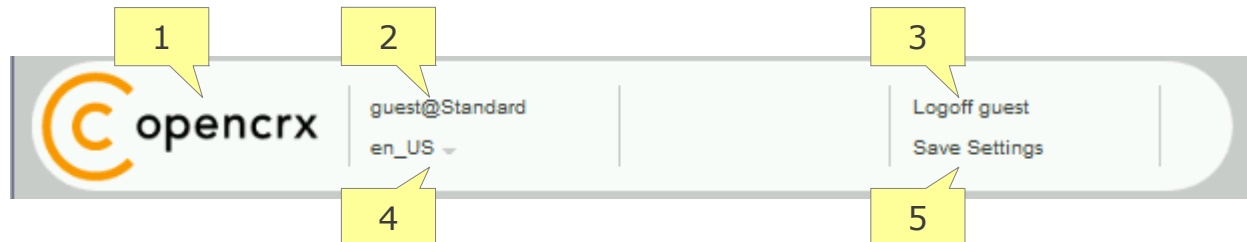
1	logo – click to show main menu (identical to fly-in menu)
2	role of current user – if current use has multiple roles, use drop down to change role
3	current user (= principal) – click to logoff
4	current locale – if multiple locales are enabled, use drop down to change locale
5	click to save current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

The main menu (with favorites and a few essential operations) is accessible in three different ways:
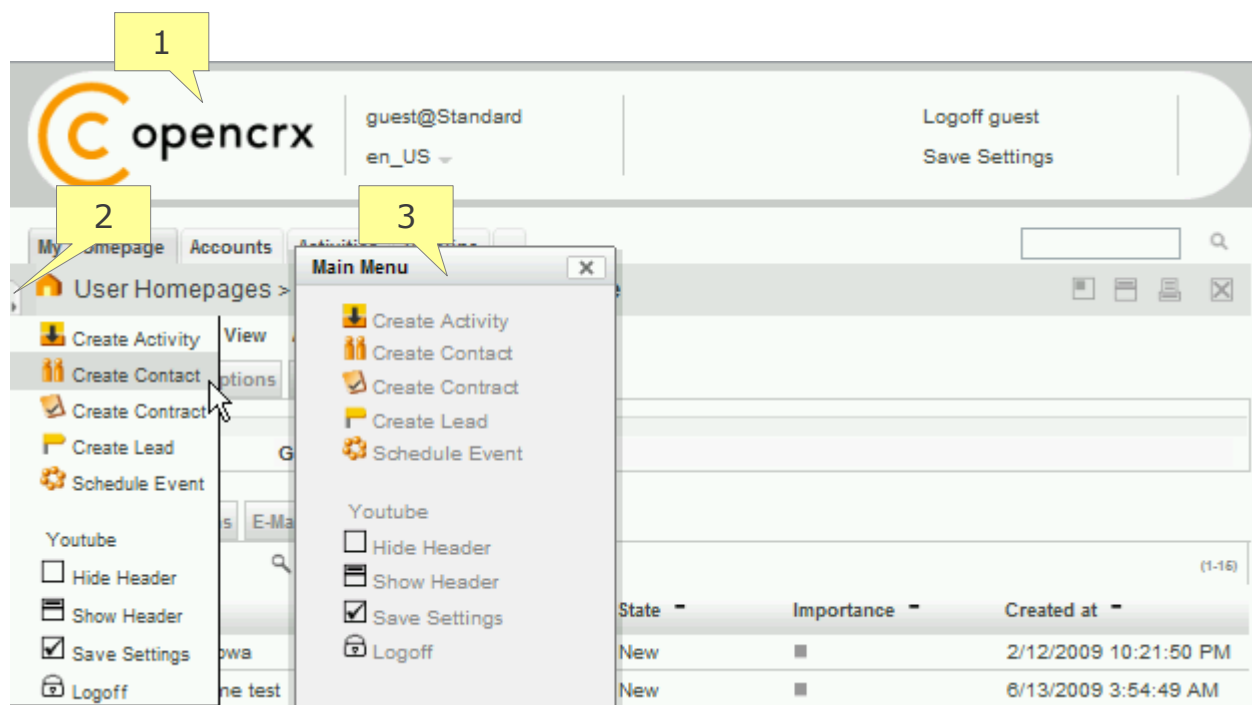
1	click the logo to display main menu
2	hover mouse over flap to show main menu as fly-in
3	hold down <CTRL><ALT> and click with your mouse to display main menu

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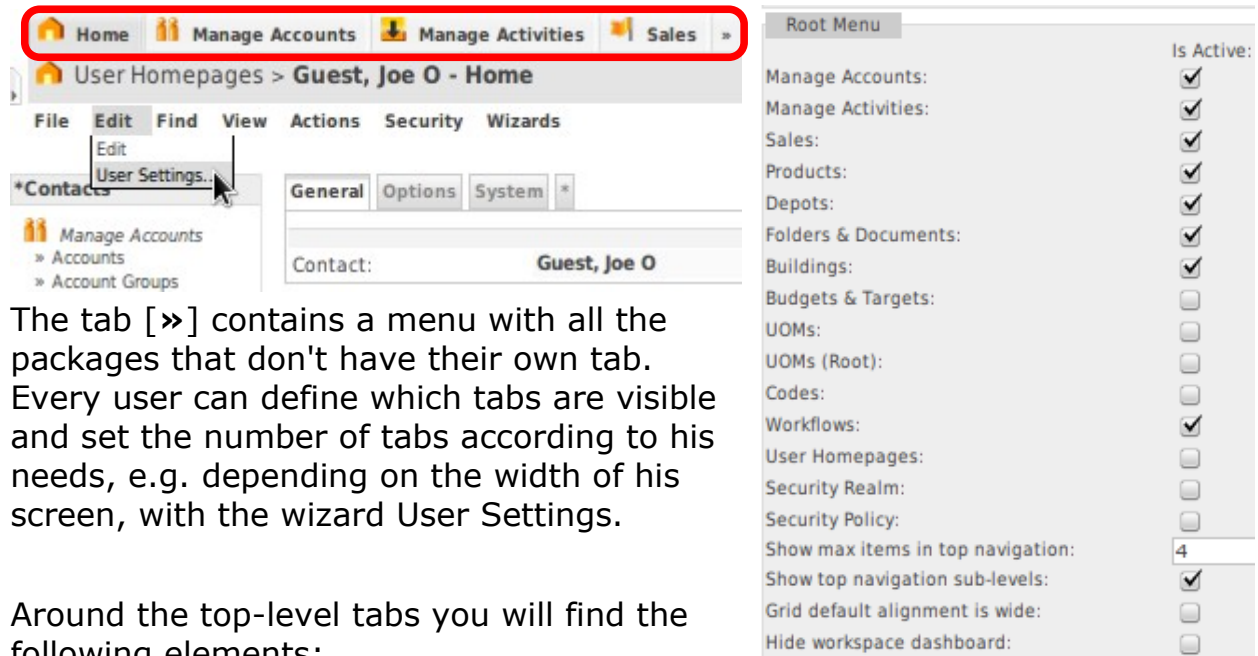
The tab [»] contains a menu with all the packages that don't have their own tab. Every user can define which tabs are visible and set the number of tabs according to his needs, e.g. depending on the width of his screen, with the wizard User Settings.

Around the top-level tabs you will find the following elements:
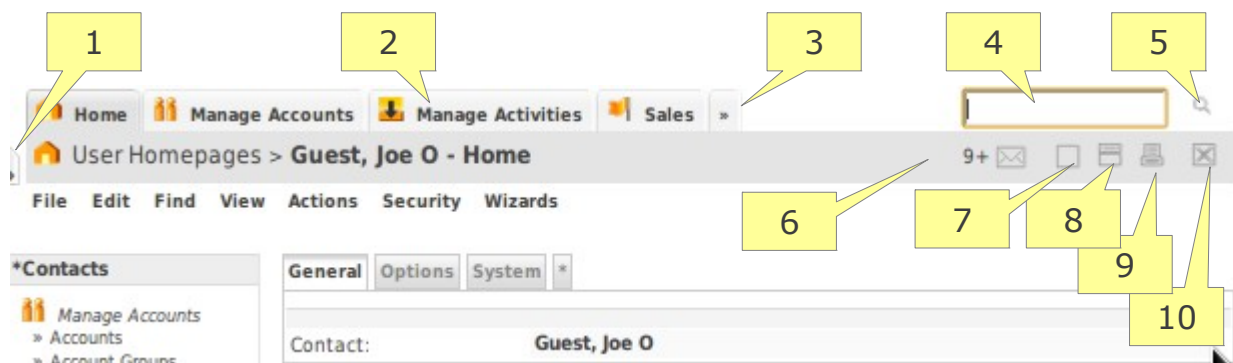
1	fly-in menu – hover mouse over flap to show (menu is identical to main menu)
2	top level tab with package names, e.g. [Manage Activities] – click to open package
3	top level tab [»] with menu for additional packages – hover mouse to show list
4	global search input box – enter search term or XRI of 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
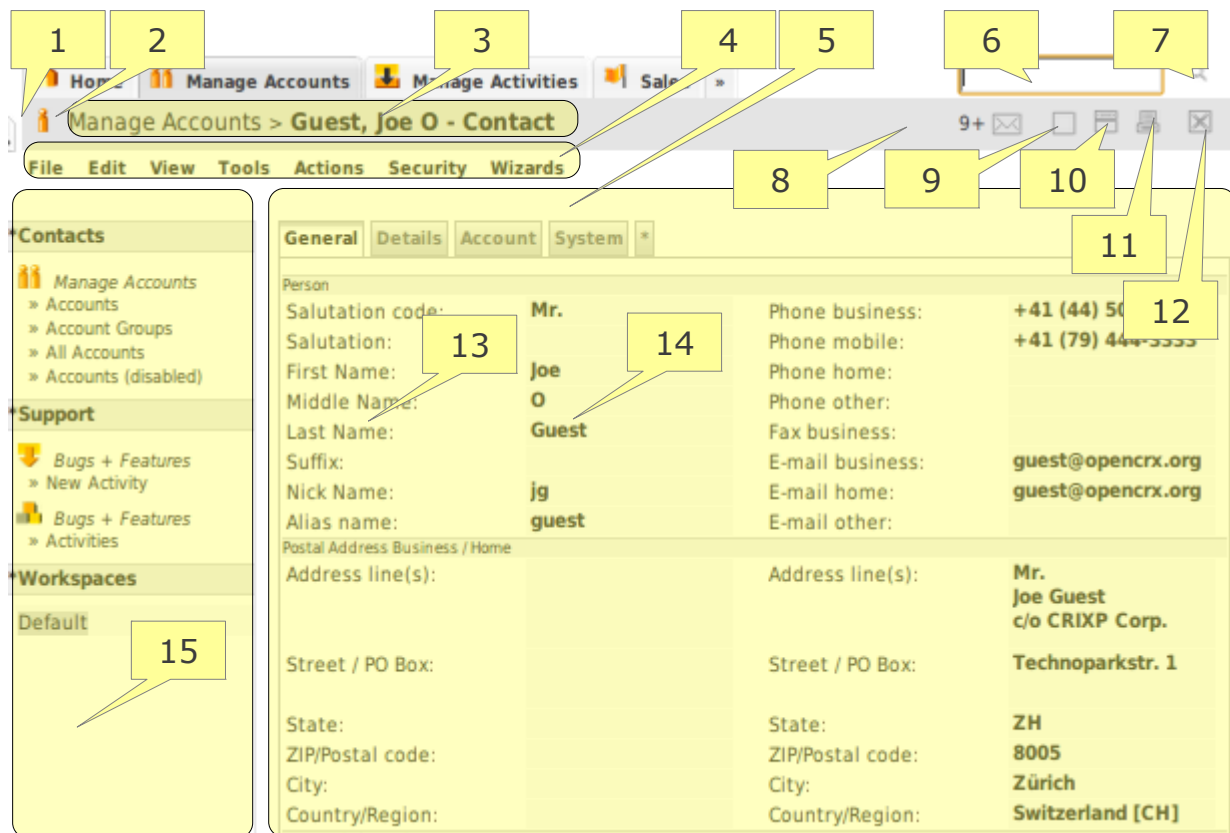
1	fly-in menu – hover mouse over flap to show (menu is identical to main menu)
2	icon of current object (e.g. Contact) – click icon to reload object from database
3	bread-crum title showing path of current object (title and type of current object are bold)
4	menu with operations, functions and wizards 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
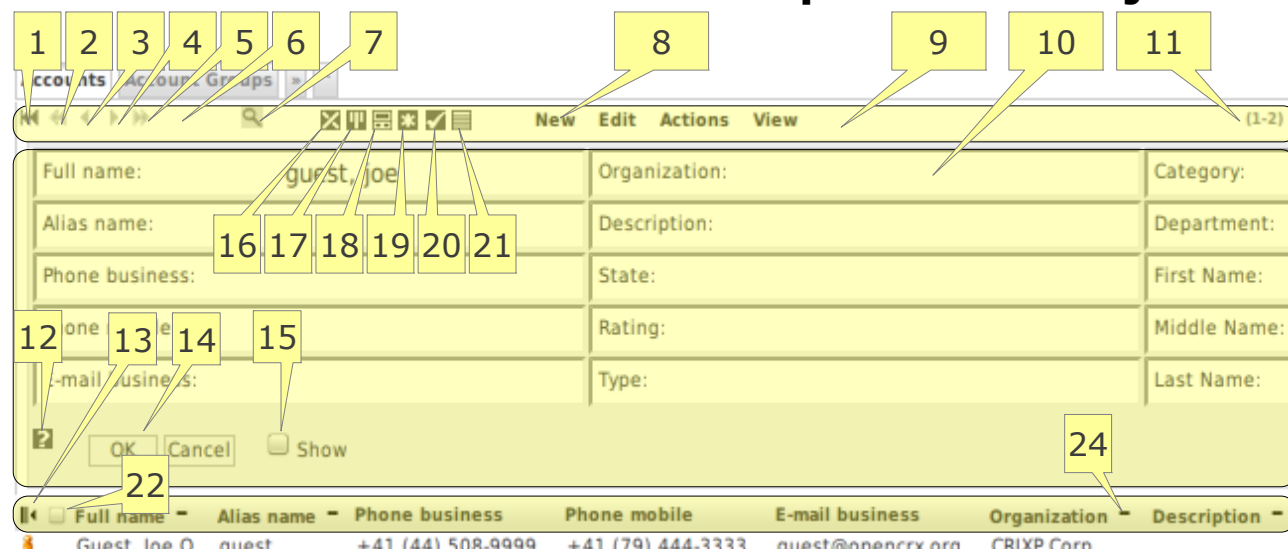
|	
1	paging – jump to 1st element
2	paging – backwards 10 pages (i.e. 10 times page up)
3	paging – backwards 1 page (i.e. page up)
4	paging – forward 1 page (i.e. page down)
5	paging – forward 10 pages (i.e. 10 times page down)
6	paging – jump to last element
7	looking glass icon to hide/unhide grid's 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	check box 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 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:
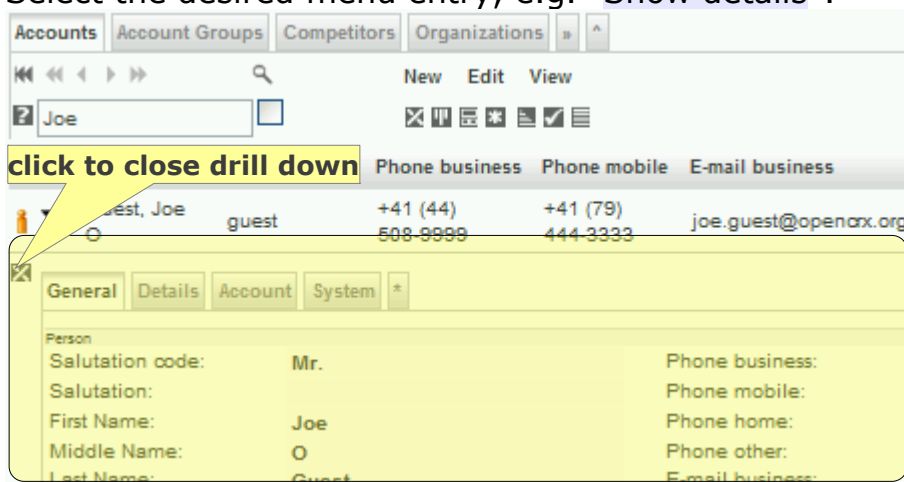
1. Move your mouse just to the right of an object's icon. The grid drill down icon ▾ should appear as follows:
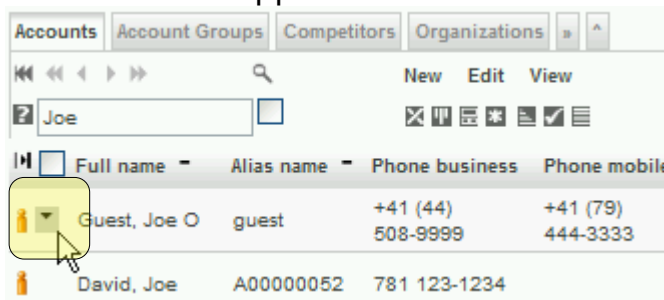
2. Click on the grid drill down icon to show the drill down menu:
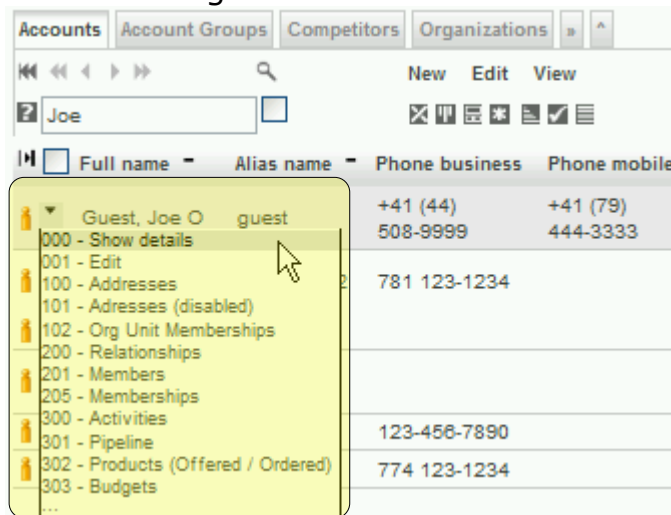
3. Select the desired menu entry, e.g. "Show details":

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

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:
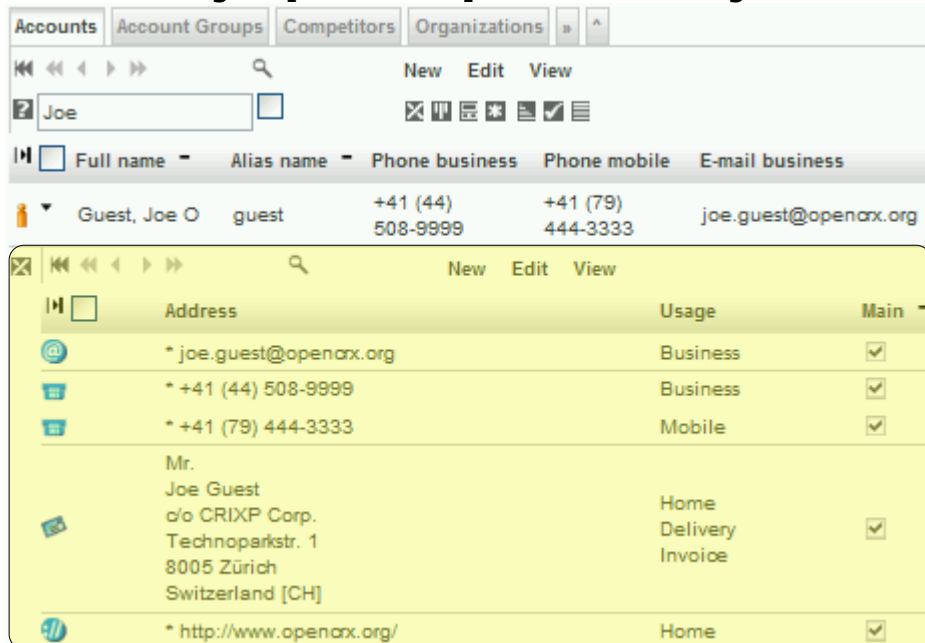
5. The drill down feature works recursively, i.e. you can drill down within the grid [Addresses] and load the detail view of an individual address:
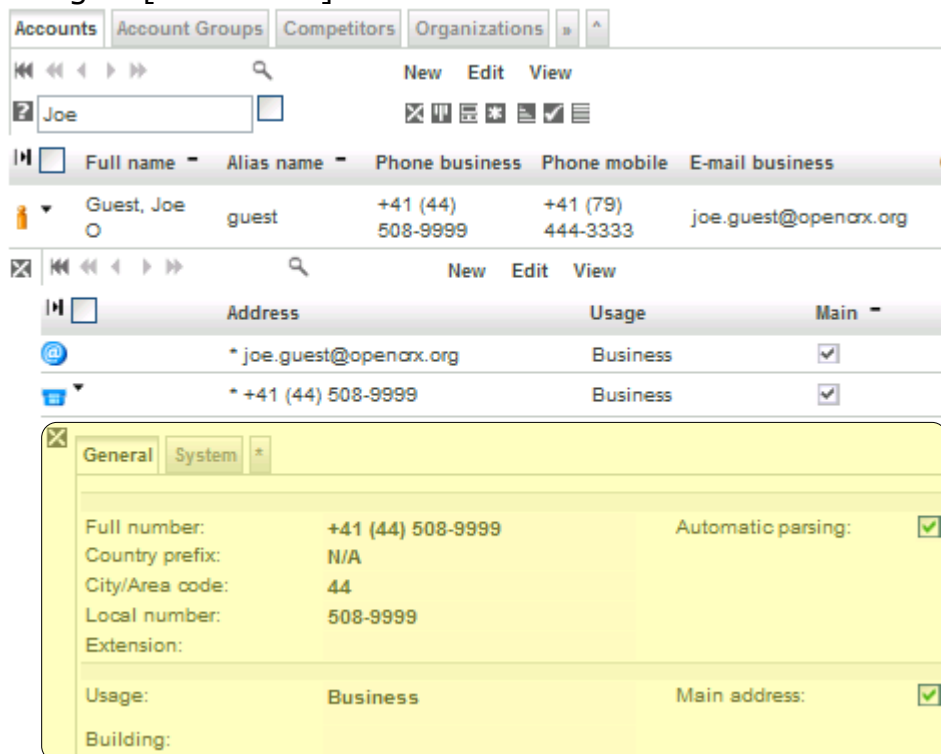
6. Close the drill down area with a click on the icon ⊠ .

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 place 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.

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   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.

8.1   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)
- 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@opencrx.org
Sendmail subject prefix:	[CRX:Standard]
Web access URL:	http://demo.opencrx.org/opencrx-core-CRX

Root Menu

	Is Active:
Manage Accounts:	☑
Manage Activities:	☑
Sales:	☐
Products:	☐
Depots:	☐
Folders & Documents:	☑
Buildings:	☐
Budgets & Targets:	☐
UOMs:	☐
Codes:	☐
Workflows:	☐
User Homepages:	☐
Security Realm:	☐
Show max items in top navigation:	3
Show top navigation sub-levels:	☐
Grid default alignment is wide:	☐
Hide workspace dashboard:	☐

Save   Close

Subscriptions

	Is Active	Notify on Creation	Notify on Replacement	Notify on Removal
Account Modifications:	☐	☐	☐	☐
Activity Follow Up Modifications:	☐	☐	☐	☐
Activity Modifications:	☑	☑	☑	☐
Alert Modifications:	☑	☑	☐	☐
Alert Modifications (Twitter):	☐	☐	☐	☐
Booking Modifications:	☐	☐	☐	☐
Competitor Modifications:	☐	☐	☐	☐
Compound Booking Modifications:	☐	☐	☐	☐
Invoice Modifications:	☐	☐	☐	☐
Lead Modifications:	☐	☐	☐	☐
Opportunity Modifications:	☐	☐	☐	☐
Organization Modifications:	☐	☐	☐	☐
Product Modifications:	☐	☐	☐	☐
Quote Modifications:	☐	☐	☐	☐
Reminder Modifications (Alert):	☑	☑	☑	☐
SalesOrder Modifications:	☐	☐	☐	☐

8.2 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":

Alerts	Reminders	Subscriptions	Service Accounts	Pending / Completed Workflows	History	**Favorites**

	Reference ▬	Name ▬
☆	Manage Activities	Create Activity
☆	Manage Accounts	Create Contact
☆	Sales	Create Contract
☆	Sales	Create Lead
☆	Manage Activities	Schedule Event
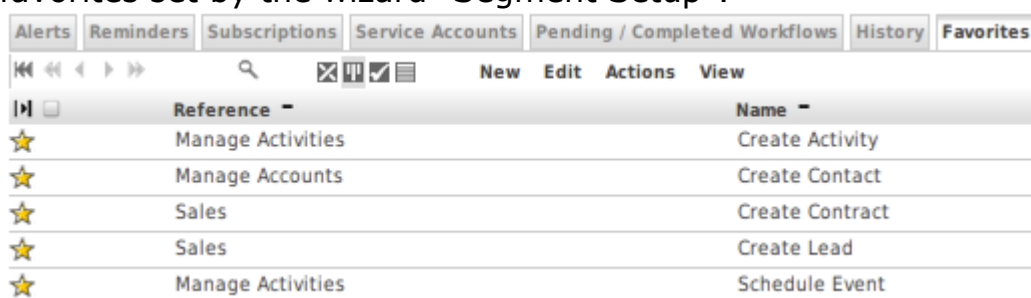
- select the grid menu **New > Favorite** to load a form that allows you to define a new favorite:

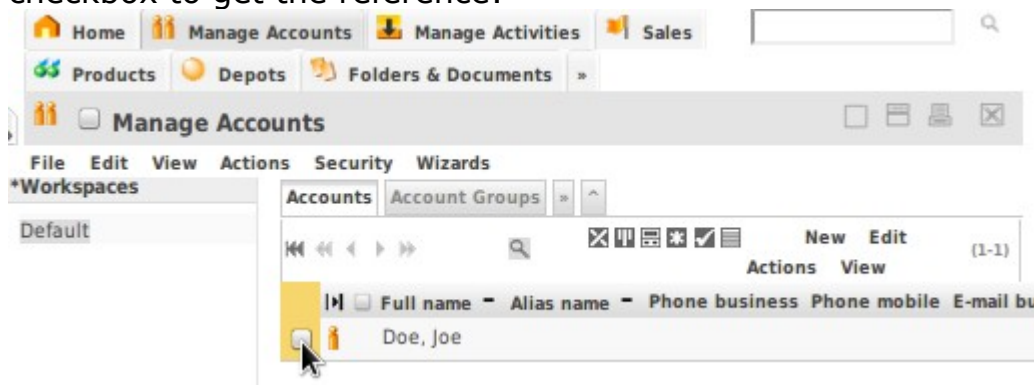**Untitled - Favorite**

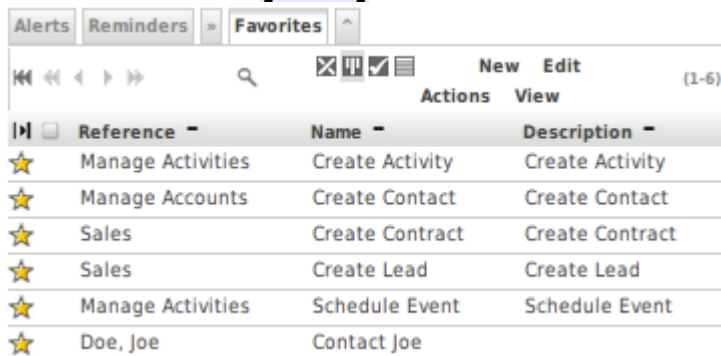| **General**	System	*

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 | **Accounts** | Account Groups | » | ^ |

Default

New   Edit   (1-1)
Actions   View

	☐ Full name ▬	Alias name ▬	Phone business	Phone mobile	E-mail bu
☐ 👤	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:

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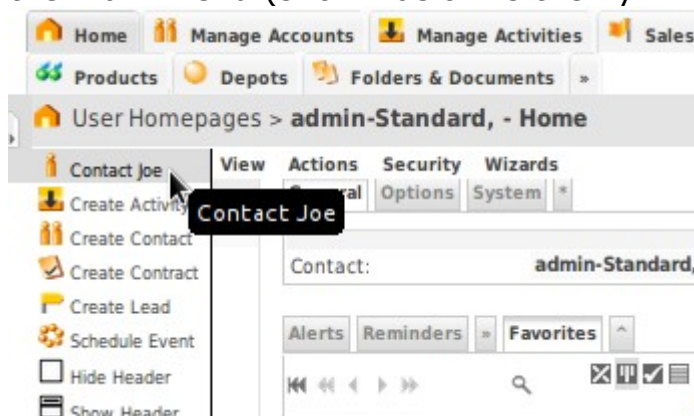

Favorites defined by segment administrators (e.g. admin-Standard) are available to all users.

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]

8.3   Workspace Dashboard

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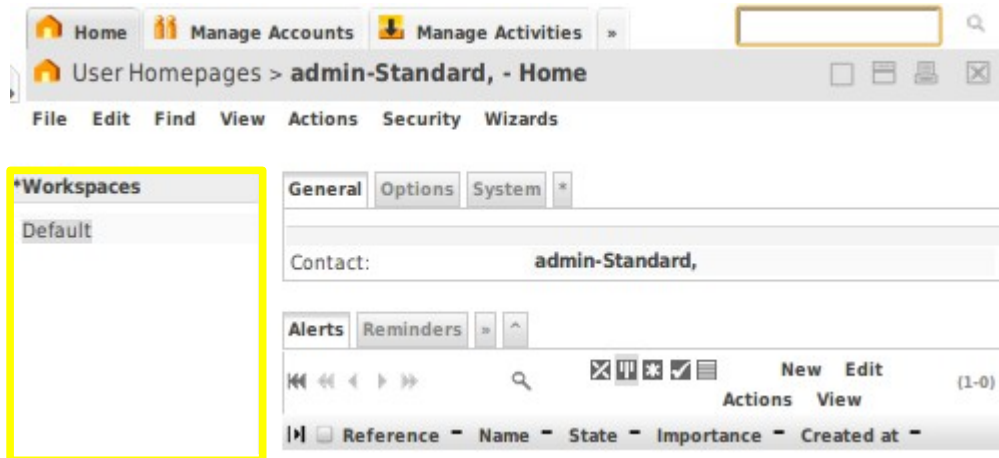

With the wizard User Settings you can hide/show the workspace dashboard (see chapter 8.1 User Settings).

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:
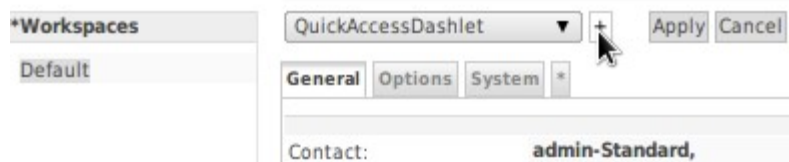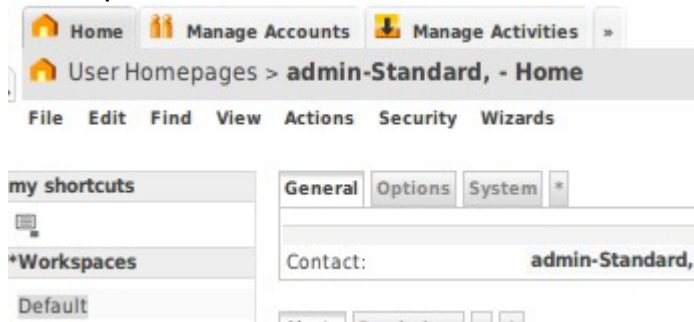

- enter the label, e.g. "my shortcuts" into the respective field

- optionally, set vertical/horizontal order and the width

- click the button [Apply] to save the current configuration:
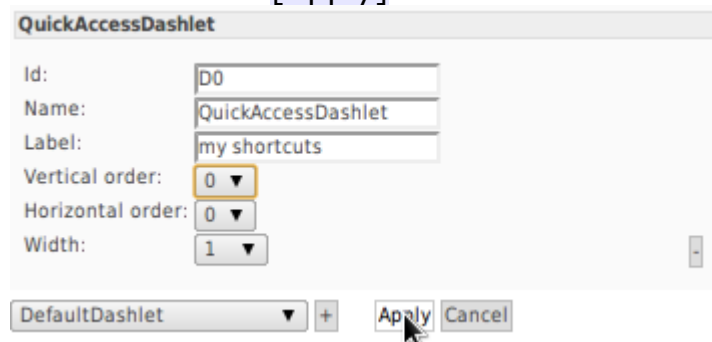
- click the button [Cancel] to leave the wizard

- 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 workpsace 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:
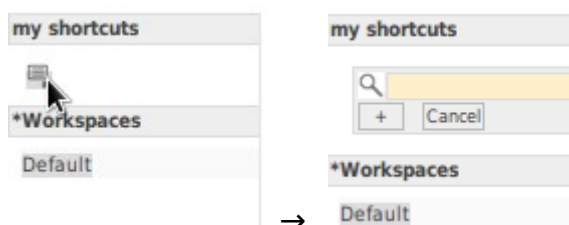
- click on the looking glass icon to the left of the colored input field to open the lookup inspector; navigate to the object the new shortcut should reference (point to) and then click the respective checkbox to get the reference:
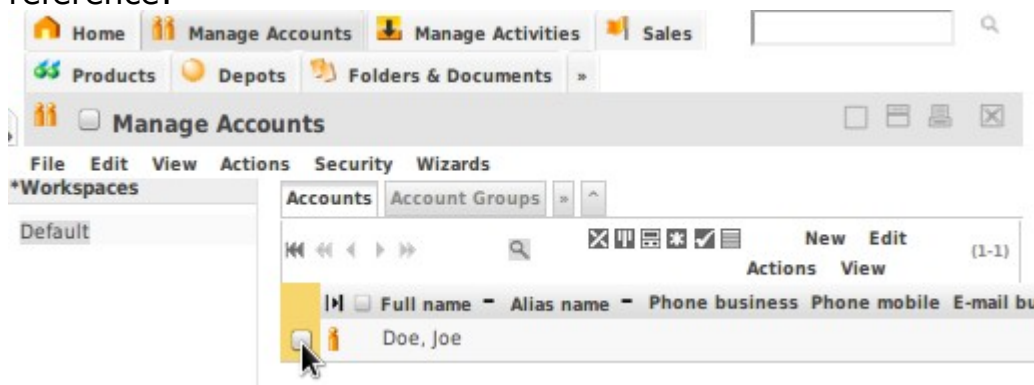
- back in the dashlet the content of the colored field has been set automatically and the select box right underneath is populated with all the actions that are available for the selected object:
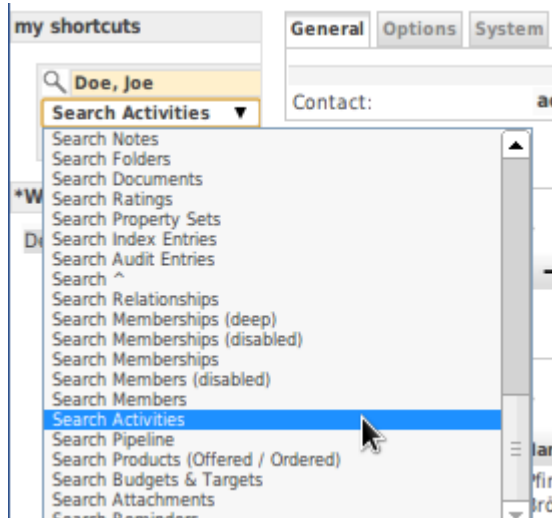
- select the desired action and then click the button [+] to add the shortcut to the dashlet:
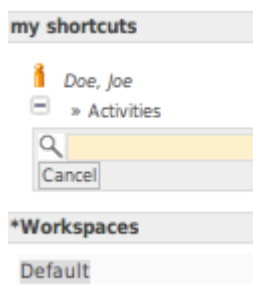
- if you want to remove a shortcut, simply click on the button [-] to the left of the shortcut

- 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 workpsace dashboard will be lost after you log out).

8.4   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).
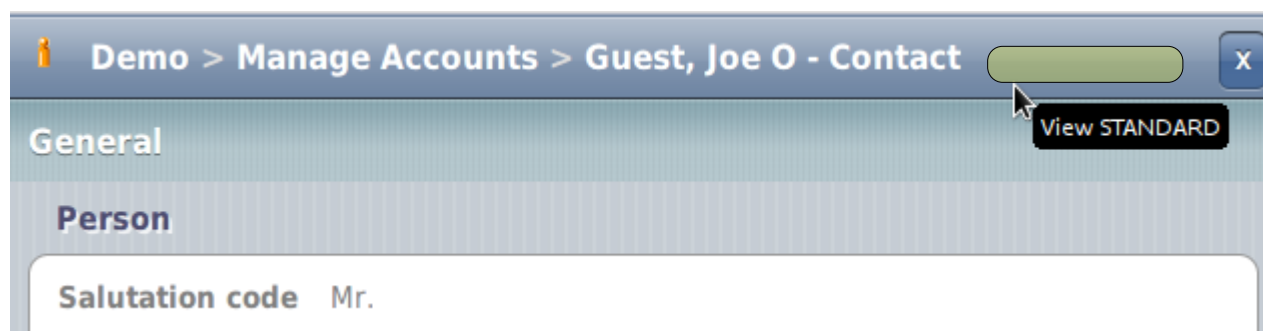
9   PDA / MOBILE GUI

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

9.1   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:
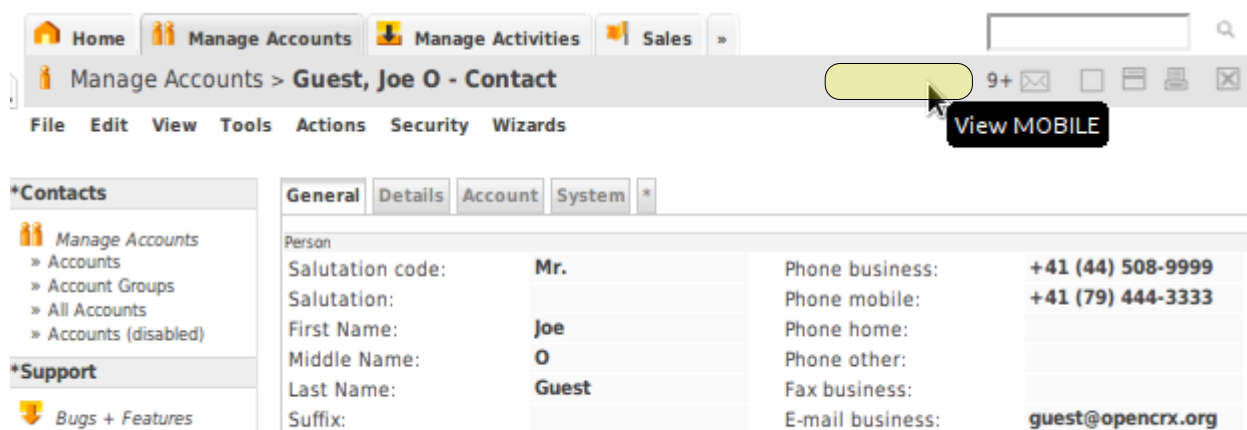

The current view will reload in MOBILE GUI mode. You can switch back to STANDARD GUI mode at any time by clicking into the area to the left of the close button [X] in the bread-crum title bar, again highlighted yellow in the following screen shot:

## 9.2   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.

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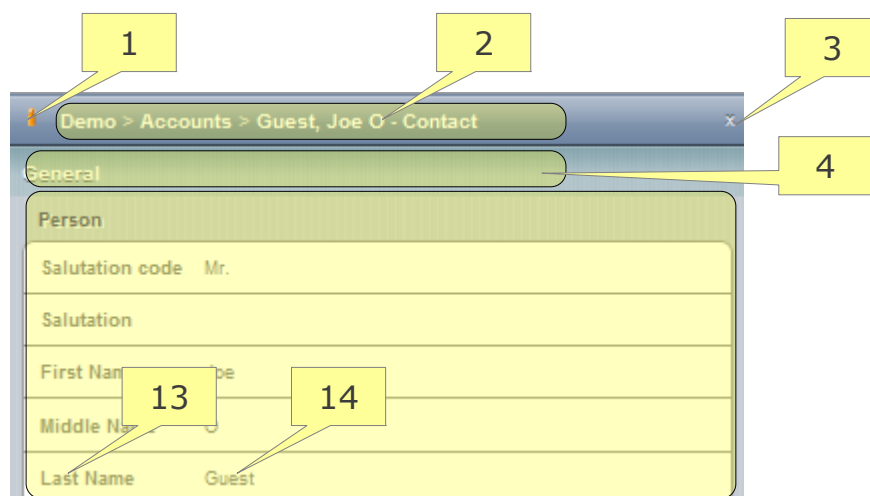
| 1	icon of current object (e.g. Contact) – click icon to reload object from database
2	bread-crum title showing path of current object (title and type of current object are bold)
3	close current inspector and navigate back to previous object (similar to browser [back])
4	inspector tab (click to collapse/expand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

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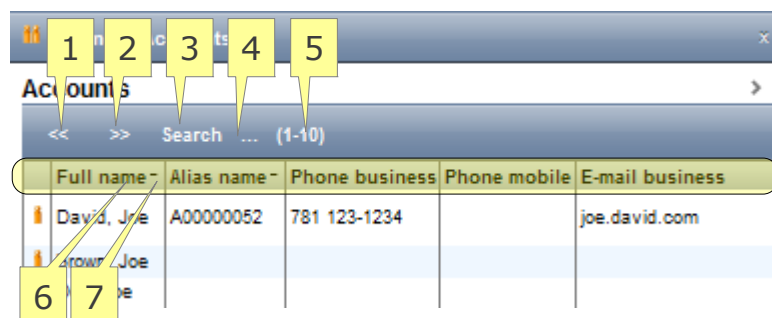
1	paging – backwards 1 page (i.e. page up)
2	paging – forward 1 page (i.e. page down)
3	click/tap [Search] to hide/unhide grid's search form
4	click/tap [...] to hide/unhide grid's filter area
5	range of rows being shown
6	column header – if attribute is sortable you can click header to change sorting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

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

The MOBILE GUIS's **filter area** provides similar functionality as the filter area of the STANDARD GUI:
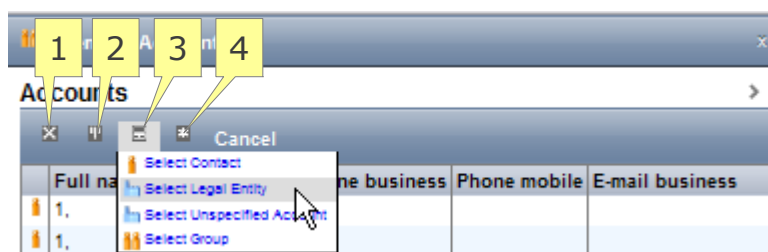
1	click to clear all filters
2	activate default filter/sorter
3	class filters (model driven)
4	pre-customized filters (based on xml files)