# openCRX GUI - Getting Started

Version 2.9.1



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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 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:

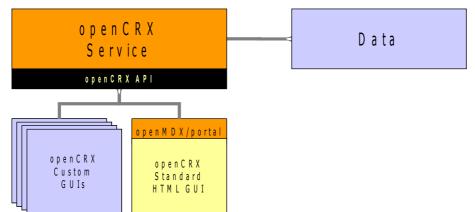


Figure 1: Types of openCRX GUIs

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):



- **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				
Copencrx	guest@Standard en_US →		Logoff ( Save S	
My mepage Accounts Mai	n Menu X	]		• • • • •
Create Activity View	Create Activity	-		
Create Contract	Create Contract Create Lead Schedule Event			
Schedule Event	Youtube Hide Header			
Hide Header	Hide Header Show Header Save Settings	State -	Importance -	(1-16) Created at
Save Settings wa	C Logoff	New		2/12/2009 10:21:50 PM
D Logoff ne test		New		6/13/2009 3:54:49 AM

1	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</alt></ctrl>	

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:

in Home iii Mana	age Accounts	L Manage Activities	Sales »
n User Homepag	es > Guest,	Joe O - Home	
Edit	iew Actions	Security Wizards	
*Contacts	General	Options System *	
Manage Accounts » Accounts » Account Groups	Contact:	Guest	, Joe O

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:

Root Menu	
	Is Active:
Manage Accounts:	$\checkmark$
Manage Activities:	$\checkmark$
Sales:	≤
Products:	
Depots:	s S
Folders & Documents:	
Buildings:	$\checkmark$
Budgets & Targets:	
UOMs:	
UOMs (Root):	
Codes:	
Workflows:	$\checkmark$
User Homepages:	
Security Realm:	
Security Policy:	
Show max items in top navigation:	4
Show top navigation sub-levels:	
Grid default alignment is wide:	
Hide workspace dashboard:	

1 Home <b>11</b> Manage	2 3 4 5 Accounts Manage Activities Sales »
File Edit Find View	Actions Security Wizards 6 7 8
*Contacts	General Options System * 9
Manage Accounts » Accounts » Account Groups	Contact: Guest, Joe O

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

Manage Accounts	Accounts Mr rage Act > Guest, Joe O - Cont s Actions Security With	act	5 6 9+[ 8 9	
Contacts Manage Accounts	General Details Accour	nt System *		11
<ul> <li>» Accounts</li> <li>» Account Groups</li> <li>» All Accounts</li> <li>» Accounts (disabled)</li> </ul>	Salutation code: Salutation: 13 First Name:	Mr. Joe	Phone business: Phone mobile: Phone home:	+41 (44) 50 <u>12</u> +41 (79) 444-3333
Support Bugs + Features New Activity	Middle Name: Last Name: Suffix: Nick Name:	Guest	Phone other: Fax business: E-mail business: E-mail home:	guest@opencrx.org guest@opencrx.org
Bugs + Features » Activities	Alias name: Postal Address Business / Home	guest	E-mail other:	Mr.
Default	Address line(s): Street / PO Box:		Address line(s): Street / PO Box:	Joe Guest c/o CRIXP Corp. Technoparkstr. 1
	State:		State:	ZH 8005
	ZIP/Postal code: City: Country/Region:		ZIP/Postal code: City: Country/Region:	Zürich Switzerland [CH]

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 2 3 4 5 6 7	8 9 10 Edit Actions View	11
Full name: gurst, joe	Organization:	Category:
Alias name: 16 17 18 19 20 21	Description:	Department:
Phone business:	State:	First Name:
12 <sup>one</sup> 13 <sup>e</sup> 14 15	Rating:	Middle Name:
-mail/usine/s:	Type:	Last Name:
CK Cancel Show	24	
🖡 🗆 Full name = Alias name = Phone business	Phone mobile E-mail business Organization	Description -
Guest Ide O quest +41 (44) 508-9999	⊧41 (79) 444-3333 quest@opencrx.org CRIXP Corp.	

1	paging – jump to 1 <sup>st</sup> 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:

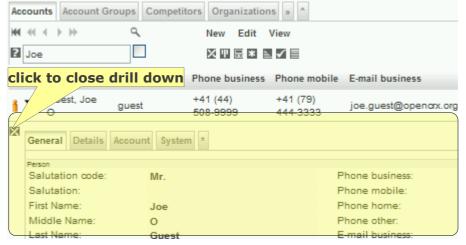
1. Move your mouse just to the right of an object's icon. The grid drill down icon ■ should appear as follows:

Accounts	Account Gr	oups Compet	itors Organization	5 » ^
HI	> >>	٩	New Edit	View
2 Joe			╳╙⊟∗╘	✓ 🗏
H Full	name -	Alias name 🗧	Phone business	Phone mobile
i 🖉 Gue	est, Joe O	guest	+41 (44) 508-9999	+41 (79) 444-3333
Dav	vid, Joe	A0000052	781 123-1234	

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

Accounts Account Gr	oups Compe	titors Organization	15 » ^
$\mathbf{H} \ll \mathbf{I} \Rightarrow \mathbf{W}$	٩	New Edit	View
2 Joe		X # 🗄 * 🗎	
H Full name -	Alias name	Phone business	Phone mobile
Guest, Joe O	guest	+41 (44) 508-9999	+41 (79) 444-3333
001 - Edit 100 - Addresses 101 - Adresses (disab 102 - Org Unit Membe		781 123-1234	
200 - Relationships 201 - Members 205 - Memberships	-		
300 - Activities 301 - Pipeline		123-456-7890	
302 - Products (Offer 303 - Budgets	ed / Ordered)	774 123-1234	
		,	

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:

Ac	counts Acco	ount Groups Compet	titors Organizatio	ns » ^		
н	$\nleftrightarrow \leftrightarrow \twoheadrightarrow$	٩	New Edit	View		
2	Joe		Х‼⊞*			
ы	Full name	e – Alias name –	Phone business	Phone mobile	E-mail busine	55
ň	<ul> <li>Guest, Jo</li> </ul>	oe O guest	+41 (44) 508-9999	+41 (79) 444-3333	joe.guest@o	penax.org
×	₩ ≪		New E	dit View		
	H 🗌	Address		U	sage	Main =
	0	* joe.guest@open.or	x.org	В	usiness	1
	8	* +41 (44) 508-9999	)	В	usiness	~
	8	* +41 (79) 444-3333	k	N	lobile	*
	Ø	Mr. Joe Guest o/o CRIXP Corp. Technoparkstr. 1 8005 Zürich Switzerland [CH]		D	ome elivery Ivoice	X
	1)	* http://www.openax	c.org/	н	ome	×

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:

ccour	Account Gr	oups Comp	organizati	ons »		
H -4	$\leftrightarrow \rightarrow \rightarrow$	٩	New Edit	View		
Joe	2		Х里田*	L✓I		
1	Full name =	Alias name	<ul> <li>Phone busines</li> </ul>	s Phone mobile	e E-mail business	-
•	Guest, Joe O	guest	+41 (44) 508-9999	+41 (79) 444-3333	joe.guest@openarx.org	
144	$\ll \mathrel{\leftarrow} \mathrel{\mapsto} \mathrel{\mapsto}$	٩	New	Edit View		
ы		Address		Usage	Main =	
0		* joe.guest	@openarx.org	Busines	is 🗸	
11	•	* +41 (44) {	508-9999	Busines	is 🗸	
X	General System	em *				
	Full number: Country prefix City/Area code Local number Extension:	:: I E: 4	+41 (44) 508-9999 I/A I4 508-9999		Automatic parsing:	<b>&gt;</b>
	Usage: Building:	I	Business		Main address:	~

6. Close the drill down area with a click on the icon  $\ensuremath{\mathbbm Z}$  .

# 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 socalled 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,  $\geq$  500, or <= Jane, into the respective attribute's search box and then click OK, as shown below:

Leads Opportunities Q Click to show/hide	e grid's search / filter area				
KA ( ( ) ) New	Edit Actions View				
Account:	Contract role:	Expires on:			
Nan Search Box for Attribute Currency					
Sales order number:	Currency: USD	Closed on:			
Description:	Total (incl. tax): >= 500	Broker:			
Sal Search Box for Attribute <b>Total (incl. tax)</b>					
OK     Cancel     Show					

## 7.2 Operators and Wildcards

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

Symbol	Туре	Meaning	Example
%	Wildcard	like	M <mark>%</mark> ller
!%	Wildcard	not like	<mark>!%</mark> ller
*	Operator	sounds like	*Meier
i*	Operator	does not sound like	!*bang
=	Operator	equal to	<mark>=</mark> Meyer
!=	Operator	not equal to	<mark>!=</mark> Meier
<	Operator	less than	<nano< td=""></nano<>
<=	Operator	less than or equal to	<=Mambo
>	Operator	greater than	>100
>=	Operator	greater than or equal to	<mark>&gt;=</mark> 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			Subscriptions				
Timezone: 📂	Europe/Zurich	•				Notify on	
Timezone: 📑	Europe/Zurich	<b>T</b>	Account Modifications:	Is Active	Creation	Replacement	Removal
Store settings on	0		Activity Follow Up		_	0	_
logoff:			Modifications:				
Sondmail cubiect	joe@opencrx.org		Activity Modifications:	$\checkmark$	$\checkmark$	$\checkmark$	
prefix:	[CRX:Standard]		Alert Modifications:	$\checkmark$	$\checkmark$		
Web access URL:	http://demo.opencrx.o	rg/opencrx-core-CRX	Alert Modifications (Twitter):				
Root Menu			Booking Modifications:				
Manage Accounts:		Is Active:	Competitor Modifications:				
Manage Activities:			Compound Booking Modifications:				
Sales:			Invoice Modifications:				
Products:			Lead Modifications:				
Depots:	-		Opportunity Modifications:				
Folders & Docume	nts:		Organization	_	_		
Buildings:			Modifications:				
Budgets & Targets	:		Product Modifications:				
UOMs:			Quote Modifications:				
Codes: Workflows:			Reminder Modifications (Alert):	$\checkmark$	$\checkmark$	$\checkmark$	
User Homepages:			SalesOrder				
Security Realm:		_	Modifications:				
Show max items in	top pavigation:	3					
Show top navigation							
Grid default alignn							
Hide workspace da							
		<u> </u>					
Save Close							

#### 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	Subscrip	tions Service A	ccounts	Pendir	ng / Compl	eted Workflows	History	Favorites
HI	( ) ⇒	٩	╳╨✔	New	Edit	Actions	View		
D 🗆 🗌	Re	ference -					Name -		
☆	Ma	anage Acti	vities				Create Acti	vity	
☆	Ma	anage Acc	ounts				Create Con	tact	
☆	Sa	les					Create Con	tract	
☆	Sa	les					Create Lead	d	
☆	Ma	anage Acti	vities				Schedule E	vent	

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

Untitled - Favori	te
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;

A Home 🚹 Manage	Accounts 🛃 Manage Activities 🎽 Sales	Q
🚳 Products 🥥 Depo	ts 🎐 Folders & Documents »	
📫 🗆 Manage Acco	unts 🗆 🗏 📕	$\boxtimes$
File Edit View Actio	ns Security Wizards	
*Workspaces	Accounts Account Groups » ^	
Default	Ket ≪i < > >> Rev Edit Actions View	(1-1)
	IN - Full name - Alias name - Phone business Phone mobile E-	mail bu

- 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:

HH	< → ≫ Q	Actions	ew Edit () View
H 🗆	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):

A Home 🎁 Manag	ge Accounts 🕹 Ma	anage Activities 📕 Sales
55 Products 🥥 De	pots 🌖 Folders &	Documents »
n User Homepage	es > admin-Stand	lard, - Home
Condet joe	ew Actions Securi General Option	ity Wizards ns System *
Create Contact	Contact:	admin-Standard,
Create Lead	Alerts Reminde	ers » Favorites ^
Hide Header	₩ ≪ < > >>	



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:

角 Home 🎁 Manag	ye Accounts 🛃 Manage Activities 🌸 📃 🔍
n User Homepage	es > admin-Standard, - Home 📃 🖹 📓 🛛
	w Actions Security Wizards
*Workspaces	General Options System *
Default	
	Contact: admin-Standard,
	Alerts Reminders »
	Het et a b b b c C C C C C C C C C C C C C C C C
	▶ ■ Reference - Name - State - Importance - Created at -

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:

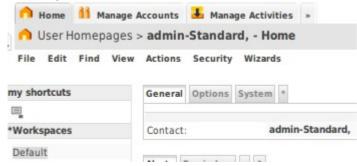
*Workspaces	QuickAccessDash	let 🔻	+ Apply Cancel
Default	General Options	System *	×.
	Contact:	admin	-Standard,

- 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:
   QuickAccessDashlet

ld: Name:	D0	
	QuickAccessDashlet	
Label:	my shortcuts	
Vertical order:	0 🔻	
Horizontal order	· O 🔻	
Width:	1 •	-

• 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:

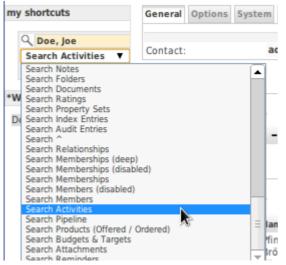
• click on the icon at the bottom of the dashlet to enter edit mode:

my shortcuts	my shortcuts
*Workspaces	+ Cancel
Default	*Workspaces
	-> Default

 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;

referencei		
Anage /	Accounts 🛃 Manage Activities 🎽 Sales	Q
55 Products 🥥 Depo	ts 🦻 Folders & Documents »	
🚹 🗆 Manage Acco	unts 🗆 🗏 👼	$\boxtimes$
File Edit View Actio	ns Security Wizards	
*Workspaces	Accounts Account Groups » ^	
Default	Ket ≪t < >>>> Q 2 22 22 22 22 22 22 22 22 22 22 22 22	(1-1)
	🛛 🕒 Full name - Alias name - Phone business Phone mobile E	-mail bu
	Doe, joe	
	20	

 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:

my shortcuts	
Doe, Joe ■ » Activities	
Cancel	
*Workspaces	
Default	

- 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

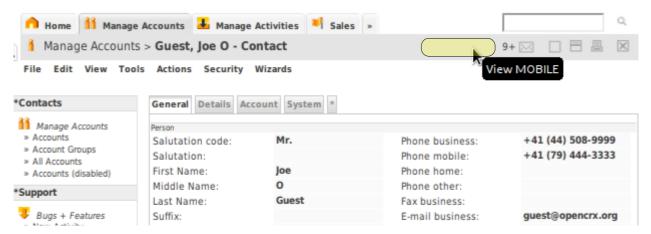
Once the root administrator (admin-Root) has defined a security policy, segment administrators can grant revoke various GUI-level permissions (see openCRX Admin Guide at <u>http://www.opencrx.org/documents.htm</u>).

# 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:



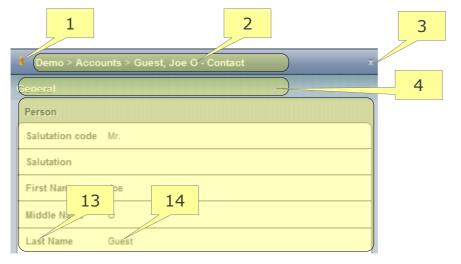
The current view will reload in MOBILE GUI mode. You can switch back to STANDARD GUI mode at any time by clicking into the area to the left of the close button [X] in the bread-crum title bar, again highlighted yellow in the following screen shot:

Demo > Manage Accounts > Guest, Joe O - Conta	ct 🚬 🗴
General	View STANDARD
Person	
Salutation code Mr.	

### 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)

Action and a second	3 <sup>ts</sup> 4 Search (	5	_	_	×
Full name -	Alias name-	Phone business	Phone mobile	E-mail business	
i David, Jre	A0000052	781 123-1234		joe.david.com	
Joe					
<mark>6 7</mark> ≈					

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)
/	soft ofder multator – click to change soft ofder (ascending – descending – disofted)

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

16 Demo > Accounts	x
Accounts	>
Full name: joe	
Allas name:	
Phone business:	
Phone mobile:	
E-mall business:	
Organization:	
Description:	
State:	
Cancel OK	
Full name* Alias name - Phone business Phone mobile E-mail bu	siness

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

11	<sup>r</sup> 2 <sup>A</sup> 3 <sup>nl</sup> 4	x
Ad	our ts	>
×	E Cancel	
	ull na hy Select Contact hy Select Legal Entity ne business Phone mobile E-mail busines	5
1	click to clear all filters	
2	activate default filter/sorter	
3	class filters (model driven)	-
4	pre-customized filters (based on xml files)	