openCRX GUI - Getting Started

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Table of Contents

List of Figures

List of Listings

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 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.
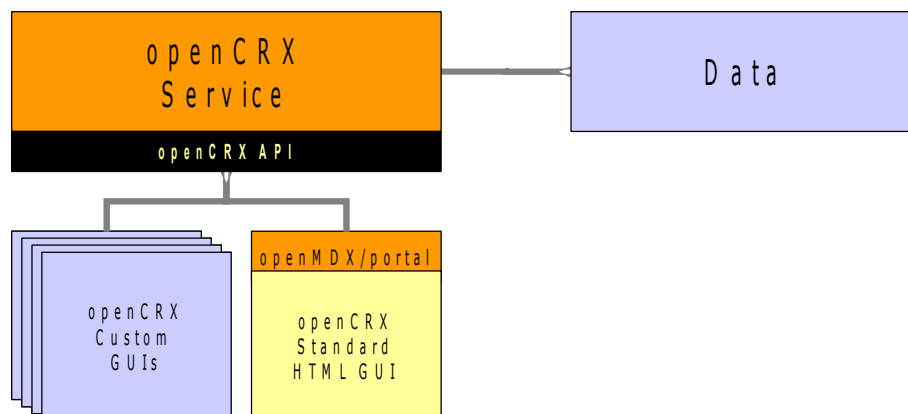
Warnings should not be ignored (risk of data loss, etc.)

2 Introduction

openCRX is distributed with a generic but extremely powerful and feature-rich HTML-GUI (built with the Bootstrap framework) that works on any device. This AJAX-enabled HTML-GUI supports a wide range of modern browsers, including Chrome, Firefox, Opera, Safari, IE, etc. and it supports any device including mobile devices (iPhone, iPad, Android-based devices, etc.).

The openCRX HTML-GUI connects to the openCRX backend through the API as shown on the right:

Figure 1: Types of openCRX GUIs

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" he/she 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 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 example wizards to manage accounts or 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.
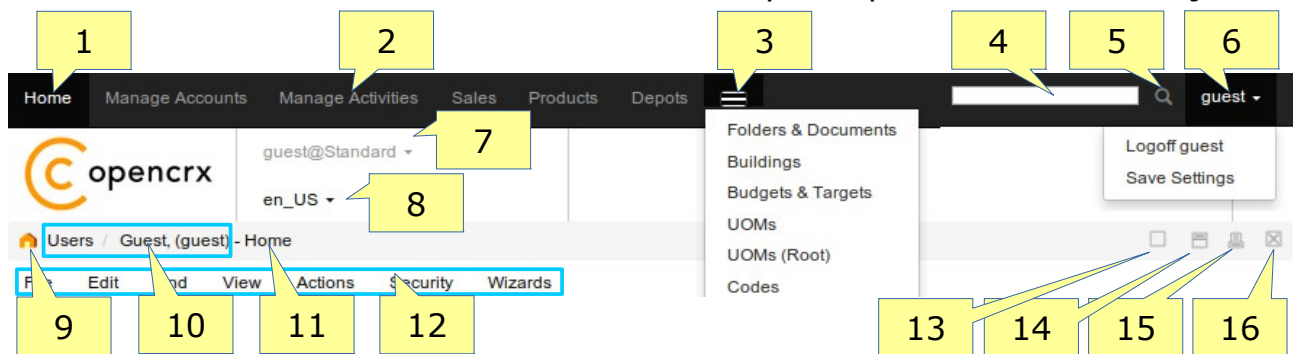
Nevertheless, there are still plenty of other tasks that you can do with the openCRX Standard GUI and this guide will help you getting these things done.

3   Basic Navigation

At the top of the screen you will find the **package menu** (also referred to as **top menu** or **root menu**) which allows you to navigate to your user home page or any enabled openCRX package (Accounts, Activities, etc.) with a single click. Depending on the browser window size the package/root menu might be collapsed and some or all entries are listed in an overflow drop-down menu. The entry of the current package (e.g. Home) is always emphasized.
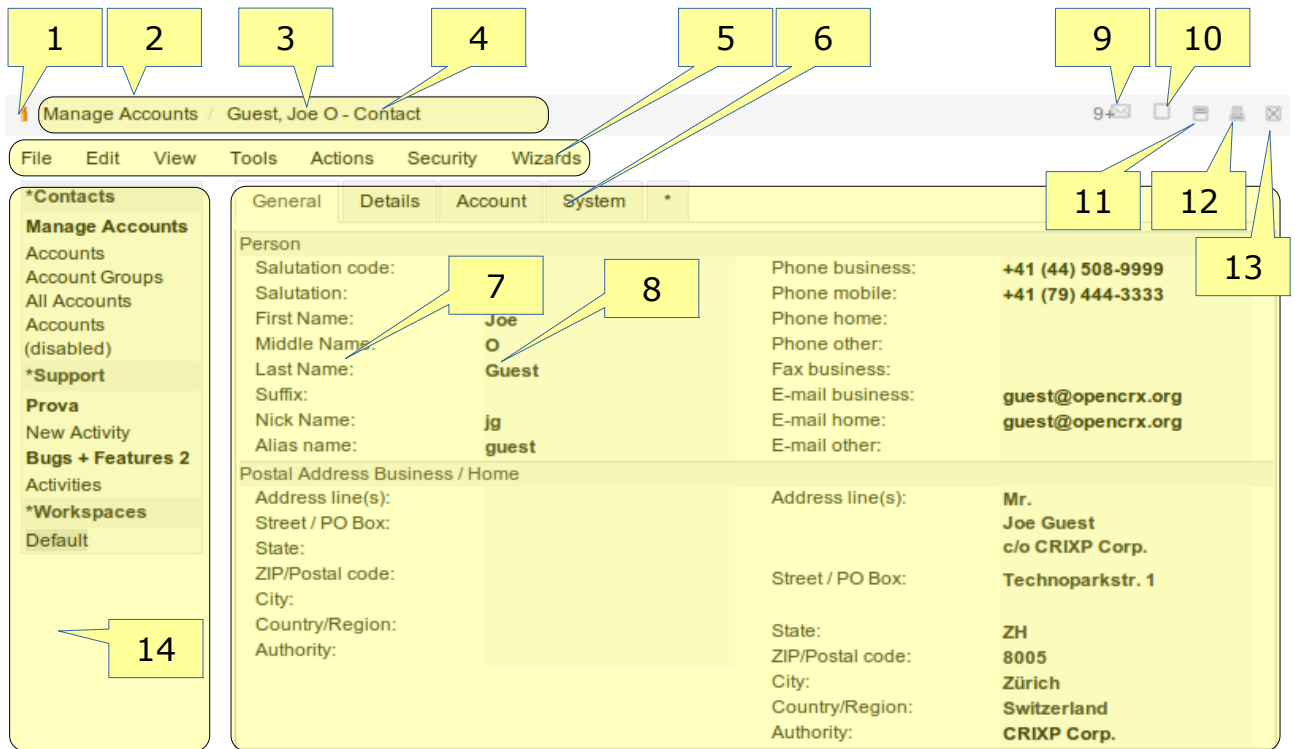
Below the package menu you will find the **header** (unless it is collapsed) which allows you to change your role and the locale (language).

The **object title line** shows the icon and the breadcrumb (object path) of the object currently loaded in the inspector. With a single click you can navigate to any other object in the current object's path. Just below the object title line there is the **main menu**. The main menu always adapts to the loaded object.

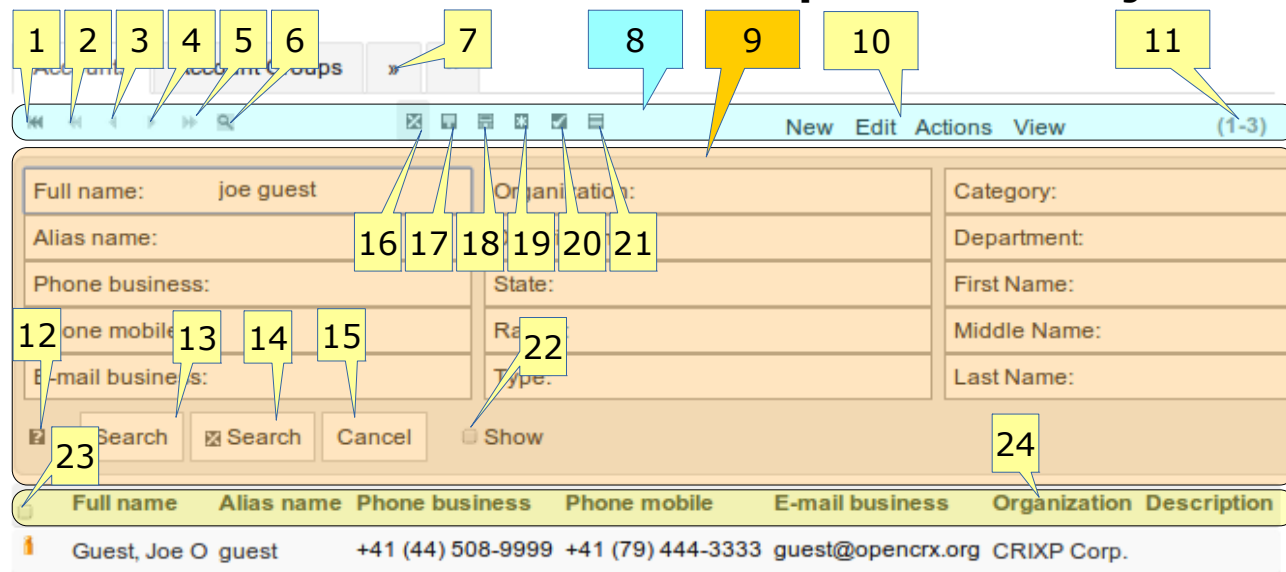| 1	package/root menu – click Home to load your user home page
2	package/root menu – click any entry to navigate to respective package
3	package/root menu overflow – click drop down to see additional available packages
4	global search input box – enter search term or XRI of object to load
5	looking glass icon – click to start global search or load object with entered XRI
6	authenticated principal – click to logout or save current settings as your default settings
7	role drop down – if authenticated principal has multiple roles, click to change role
8	current locale – if multiple locales are enabled, use drop down to change locale
9	current object's icon – click to refresh/reload object with latest values from database
10	breadcrumb / current object's path with parent(s) – click on any element to load object
11	current object's type or class name
12	main menu – automatically floats at the top if you scroll down the page
13	perspective changer (drop down menu if multiple perspectives are available)
14	click to hide/unhide header
15	click to render page printer friendly and open browser's print dialog
16	close current inspector and navigate back to previous object (similar to browser [back])

4   Inspectors – detailed views of a single Object

1	current object's icon – click to refresh/reload object with latest values from database
2	breadcrumb / current object's path with parent(s) – click on any element to load object
3	title of current object (e.g. Guest, Joe O)
4	type of current object (e.g. Contact)
5	main menu with operations, functions and wizards related to the current object
6	attribute pane showing attributes of current object (structured with tabs and field groups)
7	attribute label
8	attribute value
9	notification indicator / counter
10	perspective changer (drop down menu if multiple perspectives are available)
11	click to hide/unhide header
12	click to render page printer friendly and open browser's print dialog
13	close current inspector and navigate back to previous object (similar to browser [back])
14	workspace dashboard (can be enabled/disabled in user settings)

Note that the layout of the attribute pane automatically adapts to the width of the browser window, e.g. 2-column layouts are changed to 1-column layouts for narrow browser windows.

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	looking glass icon to hide/unhide grid's search form
7	grid tabs – click any tab to load respective tab, click [»] to show hidden tabs
8	grid's paging/filtering/menu area – create/delete objects – set number of objects to show
9	grid's search form
10	grid's menu – create new objects, delete objects, manipulate/export objects, etc.
11	range of rows being shown – page forward once to see the total number of objects
12	click question mark icon for help with searching and filtering
13	search button – click to start searching in current result set with amended search attributes
14	new search button – click to clear result set and then search with new search attributes
15	click cancel button to close search form
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 option always show search form [15])
22	check to always show search form (very useful in combination with disabled grids [21])
23	check box to select all rows (click any individual row to select/deselect row)
24	column header – if attribute is sortable you can click header to change sorting order

6   Grid Landing Page / Search Form

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

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 by default a search form is displayed:

- 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 [X Search] in the search form
- step 4: click on the icon "disable grid" (should show ⊠, not ▤)
- step 5: click on authenticated principal to open menu
- step 5: select "Save Settings" (to persist configuration)

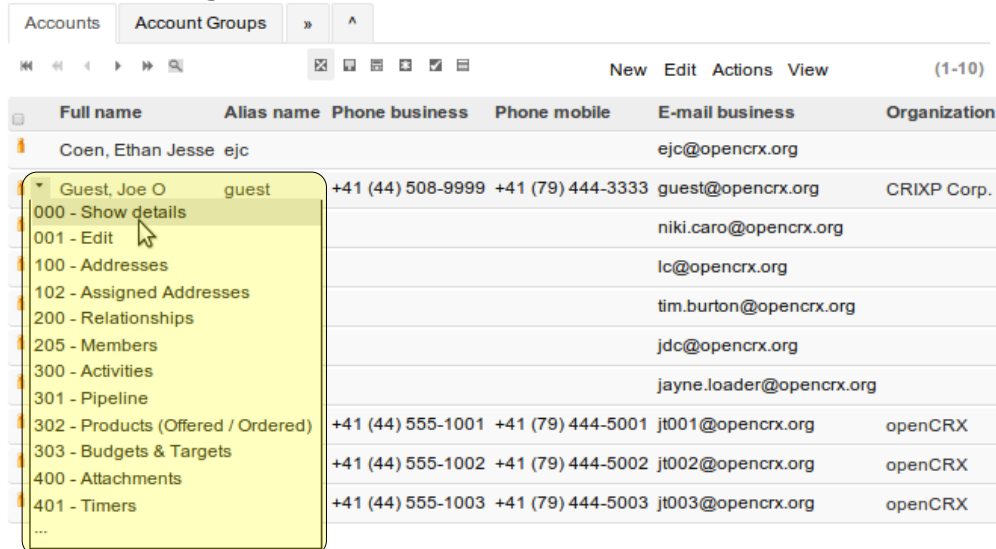Note that this configuration is specific to each grid and each user.

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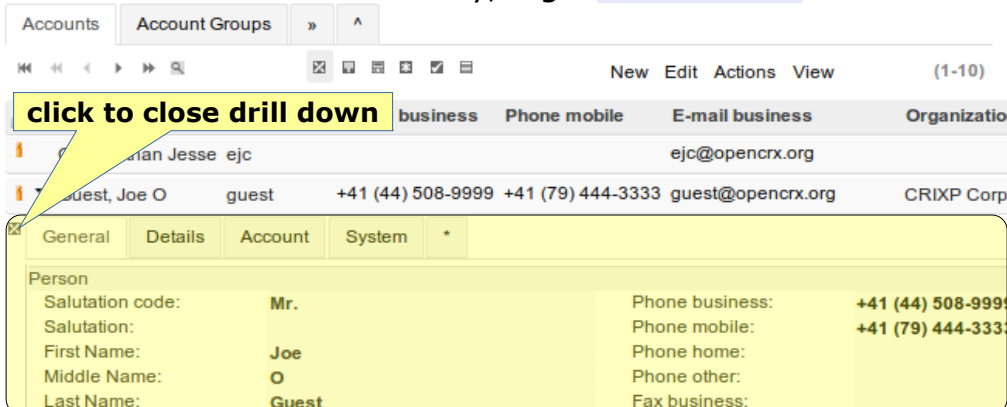
1. Move your mouse just to the right of an object's icon. The grid drill down icon ▾ should appear as follows:

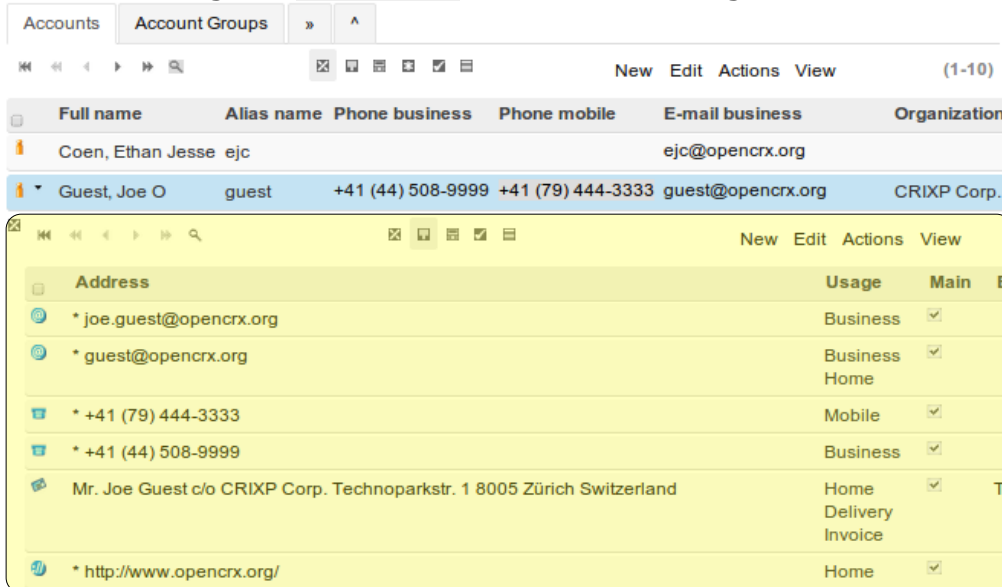2. Click on the grid drill down icon to show the drill down menu:
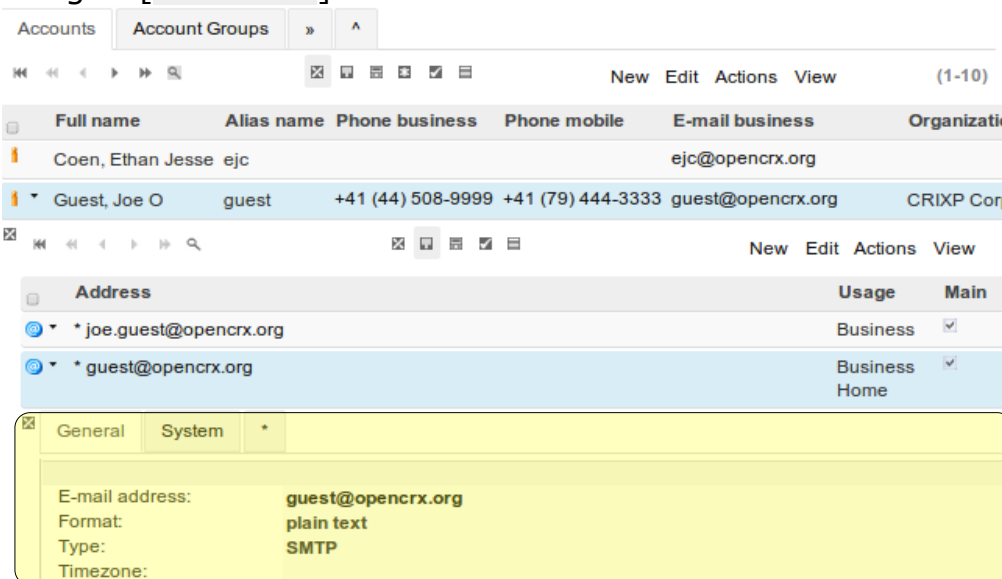
3. Select the desired menu entry, e.g. "Show details":

   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:

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:
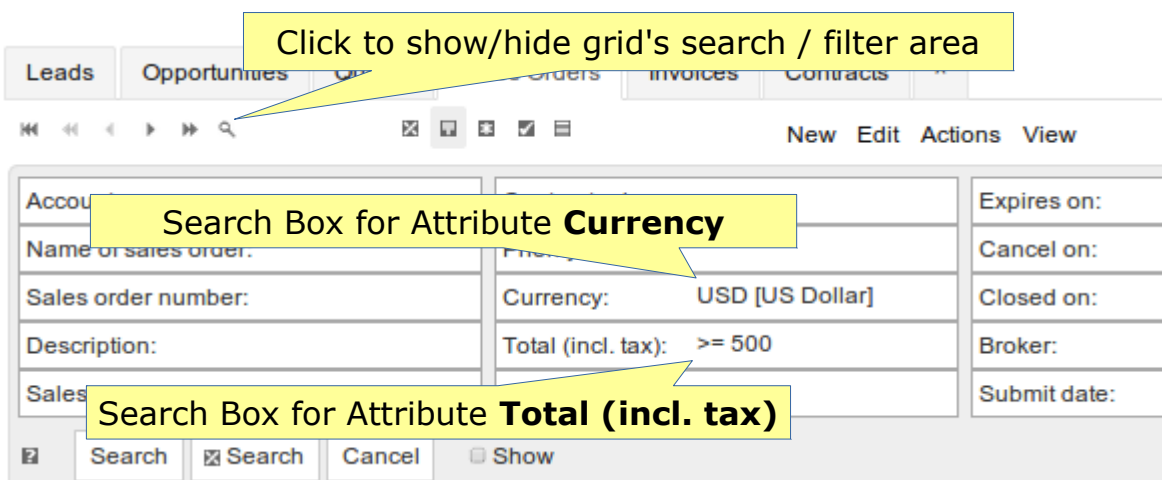

6. Close the drill down area with a click on the icon ⊠ .

8   Filtering / Sorting

In order to efficiently locate data with the openCRX GUI it is helpful to under-stand 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   Personalization / 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

The most important personalization settings are easily managed with the wizard **User Settings**. Navigate to your home page (click Home in the root menu) and then select Edit > User Settings from the main menu to start the User Settings Wizard.

1 set your timezone – you can use either the upper drop down (lists timezone names ordered by timezone) or the lower drop down (lists them in alphabetical order)

2 check this box if you want openCRX to automatically save your current settings whenever you logoff; if unchecked, changes made during a session will be lost after logoff unless you save them manually

3 enter the e-mail address at which you want to receive notification e-mails from openCRX

4 enter a prefix that will be added to the subject of all notification e-mail messages sent to you by openCRX

5 the web access URL is used in all notification e-mails – you may have to adapt it if your openCRX server is moved to a new domain/etc.

6 every user can enable/disable any of the packages activated by the openCRX

application manager – a particular package is only listed in the package menu if the respective box is checked; furthermore, if multiple perspectives are available (e.g. Root, Advanced, Simple), every user can maintain a list of enabled packages for each perspective

7 enter the number of package menu entries to be accessible with a single click – all other enabled packages are put into the package menu overflow

8 check to hide the workspace dashboard, uncheck to make it visible

9 every user can enable/disable any of the subscriptions configured by the openCRX application manager; detailed information about the openCRX notification engine is available in the openCRX Admin Guide at http://www.opencrx.org/documents.htm)
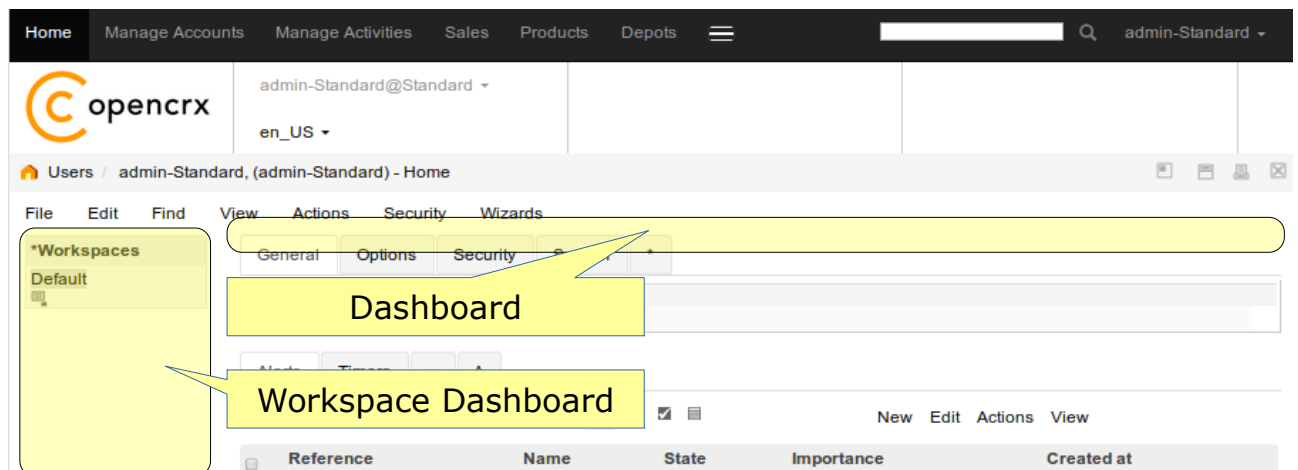
9.2   Ordering of Grid Columns

You can change the ordering of grid columns. Simply open a grid's **View** menu and then select the entry of the grid column you want to move to the right:

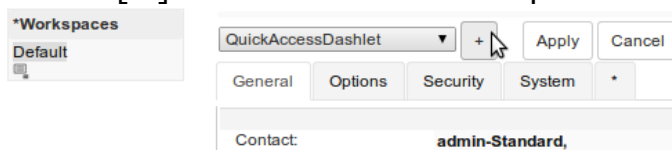## 9.3   Dashboard / Workspace Dashboard

The workspace dashboard (dashboard) is an area on the left-hand side of the screen (just above the inspector) 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).
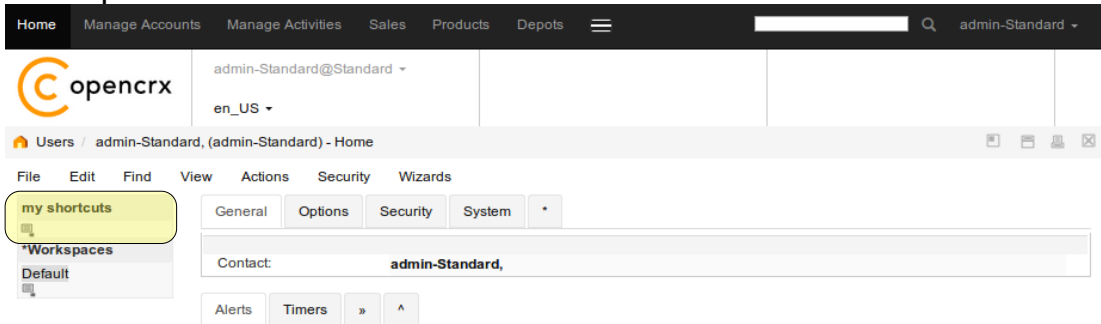
Select the menu **Wizards > Manage Workspace Dashboard** to start this wizard that allows you to manage the workspace dashboard. With the following steps you can add a QuickAccessDashlet to the workspace dashboard and configure it:

- 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 the authenticated principal in the header (top right) and then select "Save Settings" to save these changes (otherwise changes to the 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 [+] to add the shortcut:

- if you want to remove a shortcut, click on [−] 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]
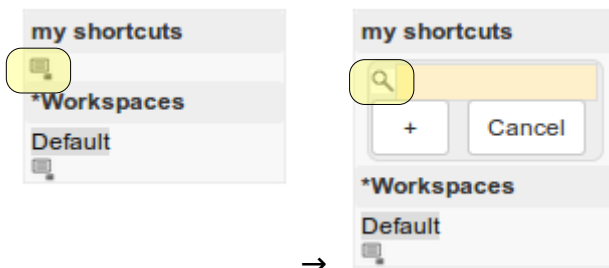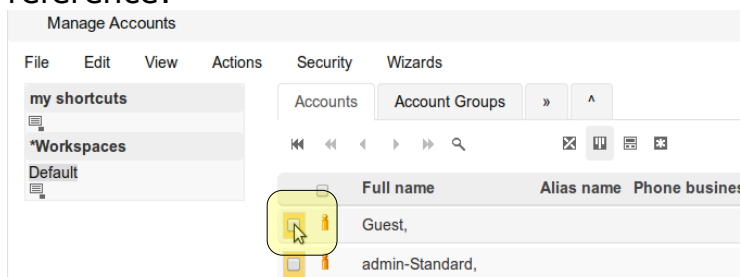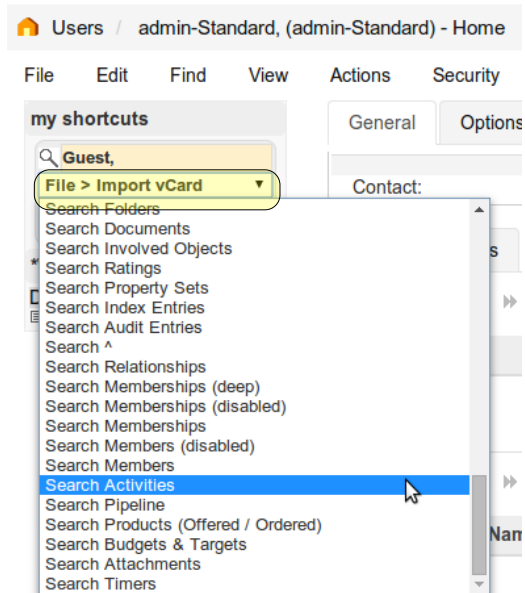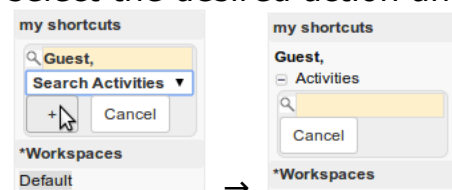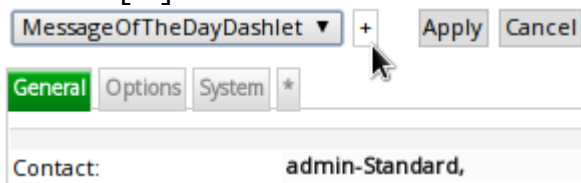
Click the authenticated principal in the header (top right) and then select "Save Settings" to save these changes (otherwise changes to the workspace dashboard will be lost after you log out).

9.4   Message of the day

openCRX features a MessageOfTheDayDashlet that you can add to the Workspace Dashboard (displayed on all openCRX pages) or to 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:

| MessageOfTheDayDashlet ▼ | + | Apply Cancel |

General | Options | System | *

Contact: admin-Standard,

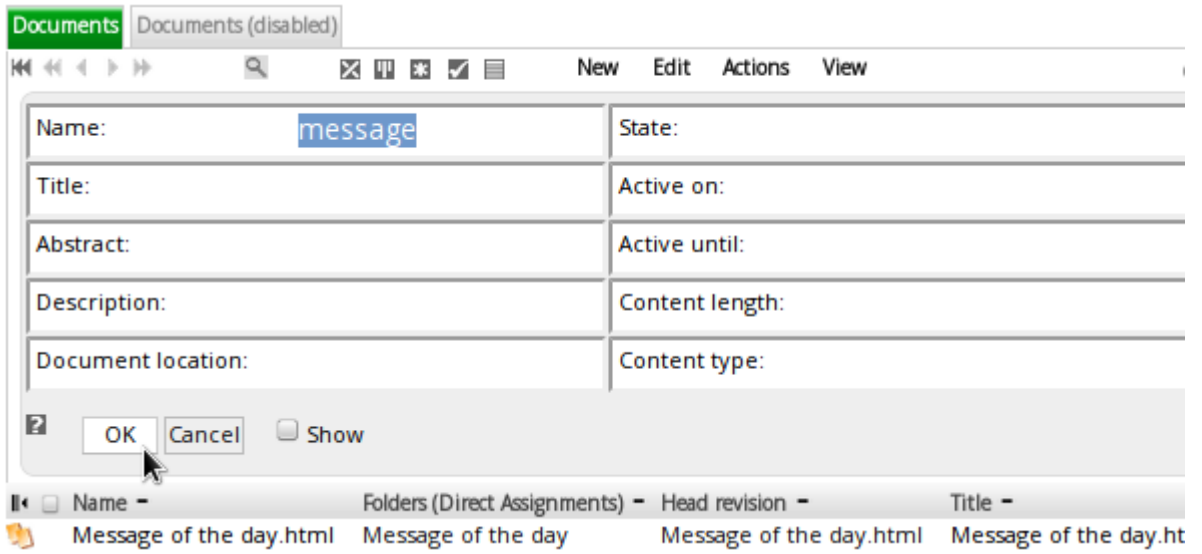- enter the label, e.g. "*Today's motto" into the respective field

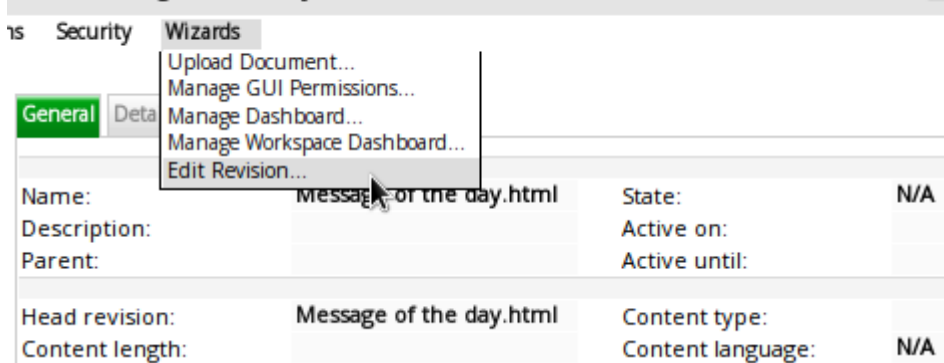> The message is made available to all users if the label starts with the star-character "*".

- optionally, set vertical/horizontal order and the width

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

*Today's motto

Id: D0
Name: MessageOfTheDayDash
Label: *Today's motto
Vertical order: 9 ▼
Horizontal order: 0 ▼
Width: 1 ▼   -

| DefaultDashlet ▼ | + | Apply Cancel |

- 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...

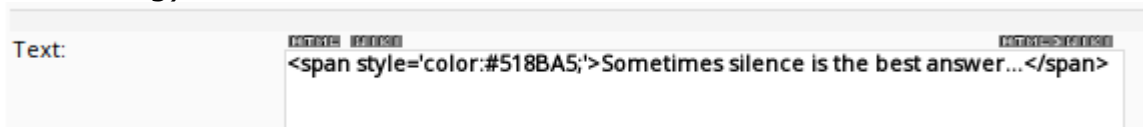- now we still need to set the message; navigate to [Folders & Documents]

- locate the document "Message of the day.html" (e.g. by searching for "document" as shown below):
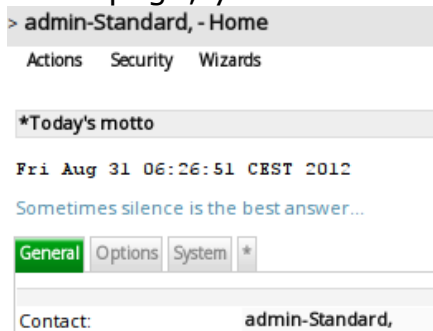
- load the document (click the icon) and select **Wizards** > **Edit Revision**:

- 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: Just speak up!

- 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,

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.