

CORASWorks® v11 End User Guide

March 2016



7918 Jones Branch Drive

Suite 800

McLean VA 22102

+1 (703) 797-1881

www.CORASCloud.com

Proprietary Statements

Copyright © 2003-2016 CORASCloud Corporation d/b/a CORASCloud. All rights reserved.

The CORASWorks and CORASCloud are trademarks of CORASCloud. No reproduction of this document is permitted without the written permission of CORASCloud. CORASCloud assumes no responsibility for, or liability for, errors contained in this publication or for incidental, special, or consequential damages arising out of the furnishing of this publication, out of the use of this publication during operation, or in connection with the performance of the software during operation.

Other product or company names mentioned herein may be the trademarks of their respective owners.

CORASWorks v11 End User Guide – Large Print

Revision Number: 1

Status: Final

Table of Contents

Preface	1
Document Purpose	1
Audience.....	1
Using A Basic Grid Display	2
Introduction	2
What is a CORASWorks View	2
CORASWorks v11 Basic Grid Display	3
Basic Grid Pieces	4
Working with the Views, Actions, and Search Toolbar.....	2
Grouping Bar	4
Column Heading Section Options	4
Sorting.....	5
Column Menu.....	5
On-Demand Filtering Bar	7
Grouping Heading Bar Section.....	7
Data Table	8
Context Menu	8
Context Menu Options.....	9
Additional Options.....	9
Refresh, Print, And Export Bar	10
Paging Information Bar.....	12
Using A Basic Calendar Display	14
Introduction	14
Basic Calendar Pieces	14
Working with the Views, Actions, and Search Toolbar.....	16

CORASCloud™ CORASWorks® v11 End User Guide

Display Resources Section Information	17
Calendar Section	18
Navigation Panel.....	18
Basic Navigation Components	24
Introduction	24
Menu Navigation Component.....	24
Tree-View Navigation Component.....	25
Up To Navigation Component	26
Using The Application Designer	27
Introduction	27
Application Designer Solution Pages	28
Two-Level Navigation – Tab and Button.....	31
Two-Level Navigation – Accordion Style.....	32
Components Section	32
Application Designer Charting.....	32
Interacting with Application Designer Charts	33

Preface

Document Purpose

This document an overview on using the CORASCloud CORASWorks v11 components within SharePoint 2010 or SharePoint 2013. This guide does not describe how to configure the CORASWorks v11 components. Instead, the pages that follow offer direction on how to interact with the components once they are placed into the SharePoint pages.

Unlike other documents, this guide describes interactivity with the components from a user's perspective. It does not include information on how to configure the pieces.

Audience

This document is intended to be used by individuals who are using the CORASCloud CORASWorks v11 components within SharePoint. It is not meant for users who are configuring the components for end-users as this document does not include any configuration information.

If you have any questions concerning the use of the CORASWorks v11 components, please contact CORASWorks Support at Support@CORASCloud.com.

Using A Basic Grid Display

Introduction

CORASCloud CORASWorks v11 Basic Grid Displays connect and consolidate information throughout workplaces built using SharePoint. They can connect a list or library located in one site with one or more lists or libraries located in any other sites or areas within your SharePoint environment. Users view the information provided and drill down into individual items.

Grid Displays are highly configurable, so there can be hundreds of different views of information that perfectly match the specific business requirements. All CORASWorks components use the SharePoint object model, so users only see the information to which they have access. If a user does not have access to see a list or site, the items from the list or site will not be included in the Grid Display.

What is a CORASWorks View

A CORASWorks view is comprised of all of the properties and settings that can be defined for a web part via the Display Wizard. This includes the sites and lists referenced, filters, sorting, grouping, display options, available actions, and more. The combination of all of those property settings are saved as a CORASWorks View and assigned a name by the builder. A single instance of a Grid Display can include one or more views.

By using multiple views, a single instance of a Data Display can present a variety of information from any combination of lists and sites.

Information can be presented in many different ways, or show data from completely different list types.

If the builder makes multiple views available for use, the user can select any of them from a drop-down at the top of the display on the toolbar. The display will be updated to reflect the properties associated with that view. If there is only one view associated with a Data Display, there will not be a Views option on the toolbar.

CORASWorks v11 Basic Grid Display

The CORASWorks v11 Basic Grid is a method for showing SharePoint information in row and column format. In addition, the Basic Grid offers the ability to organize and update data through:

- Grouping
- Filtering
- Actions
- Integrated editing
- Version Control
- Paging
- Sorting
- Exporting
- Printing

The following image breaks the Basic Grid into capabilities that may be enabled by the user who developed using the component. In short, many options are shown in the image while the person who placed the Basic Grid onto the SharePoint page only enabled those appropriate for their needs.

Basic Grid Pieces

A- Views: Tasks by Status Actions Search Help

B- Status ▾ ×

C- TITLE ASSIGNED TO STATUS PRIORITY DUE DATE ↑ % COMPLETE

D-

E- ▾ Status: Waiting on someone else (Showing 10 of 205 items. Group continues on the next page.)

<input type="checkbox"/>	Lorem Eget Mollis Lectus Pede Et Risus Quisque	Matt Walters	Waiting on someone else	(1) High	1/1/2009	75%
<input type="checkbox"/>	Laoreet Lectus Quis Massa Mauris Vestibulum,	EXT\Kim.White	Waiting on someone else	(2) Normal	1/3/2009	24%
<input type="checkbox"/>	Scelerisque Neque Sed Sem Egestas Blandit Nam Nulla Magna,	John Gold	Waiting on someone else	(3) Low	1/4/2009	85%
<input type="checkbox"/>	Erat Vel Pede Blandit Congue.		Waiting on someone else	(3) Low	1/7/2009	31%
<input type="checkbox"/>	Risus Donec Egestas Aliquam Nec Enim Nunc Ut Erat Sed		Waiting on someone else	(3) Low	1/18/2009	34%
<input type="checkbox"/>	Neque Venenatis Lacus Etiam Bibendum Fermentum Metus.	Pat Green	Waiting on someone else	(3) Low	1/20/2009	57%
<input type="checkbox"/>	Amet Orci Ut Sagittis Lobortis Mauris Suspendisse Aliquet Molestie Tellus.		Waiting on someone else	(2) Normal	1/28/2009	35%
<input type="checkbox"/>	Lectus Rutrum Urna Nec Luctus Felis Purus Ac		Waiting on someone else	(3) Low	1/31/2009	95%
<input type="checkbox"/>	Fringilla Purus Mauris A Nunc In At Pede.		Waiting on someone else	(3) Low	2/1/2009	55%
<input type="checkbox"/>	Purus Mauris A		Waiting on someone else	(2) Normal	2/2/2009	14%

F-

G- Refresh |

H- 1 2 3 4 ... Page: 1 of 100 Go Page size: 10 Ok Item 1 to 10 of 1000

- A.** The top section of the Basic Grid is the **Views, Actions, And Search Toolbar**. It allows for the selection of alternate Views for the data, Actions to run against the information, and the ability to run text-based searches against the metadata being returned by the Basic Grid.
- B.** The next section is the **Grouping Bar**. Users are able to create ad hoc groupings of data by dragging column headings into this section.
- C.** The **Column Headings** section identifies what data is being displayed. In addition, users can click on a column heading in order to sort the information and apply filtering.
- D.** When enabled, the **On-Demand Filtering Bar** permits users to limit the information being returned by entering information into a filtering box.
- E.** The **Grouping Heading Bar** is displayed when grouping is enabled. The groups can be expanded or collapsed by clicking on the bar.

- F.** The **Data Table** is the main section of the Basic Grid, showing information in row and column format. It supports right-clicking of the mouse for context menus.
- G.** The **Refresh, Print, And Export Bar** offers the ability to refresh, print, and/or export the Basic Grid's information.
- H.** The **Paging Information** section supports the ability to move between pages of information.

Working with the Views, Actions, and Search Toolbar

The Views, Actions, and Search Toolbar is shown at the top of every Data Display, unless the builder chooses to disable it. A sample toolbar with all possible options and formatting is shown below.



1. Click **Views** to see a list of all available views for this Data Display. The currently displayed view is marked with a bullet to the left. You can hover over a view name to see the description, if one is available. Click on any view name to display that view.
2. Click **Actions** to access a list of all of the actions that have been made available for this view. If you do not see this on the toolbar, then no actions are available. To execute an action:
 - a. Place a check mark in the box to the left of the item that you want to run the action against. Or, if you want to run the action against all of the items on the current page of the Data Display, place a check mark

in the box at the top of the first column. This selects all of the items on the current page.

- b. Click **Actions** and then click on the name of the action you want to run. You can hover over an action name to see the description, if one is available.
 - c. If the action definition requires you to enter any information, an action entry form is displayed. Provide the appropriate information and click **OK** at the bottom of the form.
3. Use the **Search** area to locate items that meet your criteria. If you do not see this on the toolbar, then it has been disabled by the builder. If you do see the Search area, type the content you want to search for and then click **Search**.
 - You should be aware that this search only looks at metadata (the values in the columns that were selected by the builder); it *does not* perform a full-text search of attached documents or other files. If you want to perform a full-text search, you will need to use the standard SharePoint search, located in a box with a magnifying glass near the top right corner of most sites.
 - If you see a message stating “**Please execute a search to see results,**” the builder has configured the display to require a search to be performed before any results will be displayed. (For example, you may need to select a customer before returning the transaction records for that customer.) This is often done to improve response time.
 4. Click the **Help** button to access the online help for the Data Display.

Grouping Bar

The Grouping Bar is only available when the builder has enabled this option within the Basic Grid. The Bar displays the names of the columns being used for grouping the information within the Grid.

If more than one column is being grouped upon, the columns within the Grouping Bar are displayed from left to right with the groupings of higher precedence appearing to the left. In the example below, the priority of grouping is Status first, followed by Priority, and then by the values in the Assigned To column.



To add a grouping, drag the column's heading and drop it into the Grouping Bar. Alternatively, right-click on the Column's heading and choose the "Group By" option.

To remove a grouping from the Grouping Bar, click on the column's X or click on the title box and drag it out of the Grouping Bar. Alternatively, right-click on the Column's heading and choose the "Ungroup" option.

To change the order of grouping, click on the column's title box within the Grouping bar and drag it before or after another column. To change the sorting of the column's grouping, click on the triangle to the right of the column title within the grouping box.

Column Heading Section Options

The Column Headings section identifies the data being displayed within the Basic Grid. In general, the columns being displayed represent a subset of all columns available and have been identified as the most pertinent for this Basic Grid View. Other Views may have different columns.

Sorting

The Column Headings control the sort order of the items within the Basic Grid. If sorting is applied to a Grid, an arrow will appear to the right of the column heading. An arrow pointing upward indicates the information is sorted in ascending order while an arrow pointing downward indicates descending order.

To change the sort order of a column, click on its column heading. To remove the sorting from a column, click on the column heading two times. The first click will change the sort order. Once the information refreshes, the second click will remove the sorting on the column.

When grouping is enabled, its sorting takes precedence over sorting performed within the columns. The information will still be sorted on the selected column, except it will be sorted within the groupings instead of grouping on all of the items within the Basic Grid.

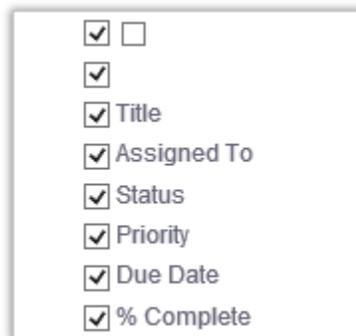
Column Menu

Each column heading includes a menu of options. To see the selections, right-click on the column heading.



The menu choices are described below. Note that all changes made using these options affect the current user only and are lost when the page is refreshed or View is changed:

- **Sorting:** The first section of the Column Menu offers sorting controls for the column. Choose to sort in ascending or descending order, or remove the column sorting entirely.
- **Grouping:** The second section provides grouping options. Choose to group on a column or to remove grouping from a column.
- **Columns:** When selected, this option allows for enabling or disabling of the display of columns within the Basic Grid. The selecting of columns is not permanent and only impacts the columns that have been made available for display by the builder. In short, additional columns of data cannot be added.



- **Filter:** The Filter menu allows for the entry of up to two search variables on the selected column. Enter the variables, choose the filter type (i.e. – Equals, Contains, Less Than), and click on the Filter button to apply. There is also a Clear Filter button.

On-Demand Filtering Bar

When enabled, the On-Demand Filtering Bar allows for the pinpointing of data within a column through filtering. The filtering options differ, based upon the column type, and any changes made using this option affects the current user only and are lost when the page is refreshed or View is changed.

To use the On-Demand Filtering option, click on the field for the column where filtering is to be applied and enter a value. When using a Date column type, click on the calendar button to the right of the field and select a date.

Once a value is entered, click on the “funnel” icon to the right and select a filtering option. The options differ based upon column type and some may not be relevant based on the data being filtered. Once the option is selected, the selected filter will automatically be applied.

To remove a filter without refreshing the page, click on the “funnel” icon and choose the “NoFilter” option (first choice).

Note that the filters only apply to the data already being returned by the component. The original source list or lists are not queried again for additional information.

Grouping Heading Bar Section

When Grouping is enabled, either by the builder or via the Grouping Bar, the items being grouped have a heading to identify the information type. If the grouping is not expanded, click on the expand icon found on the left-side of the group heading to expand the information. If grouping is

expanded, click on the collapse icon found on the left-side of the group heading to collapse the information.

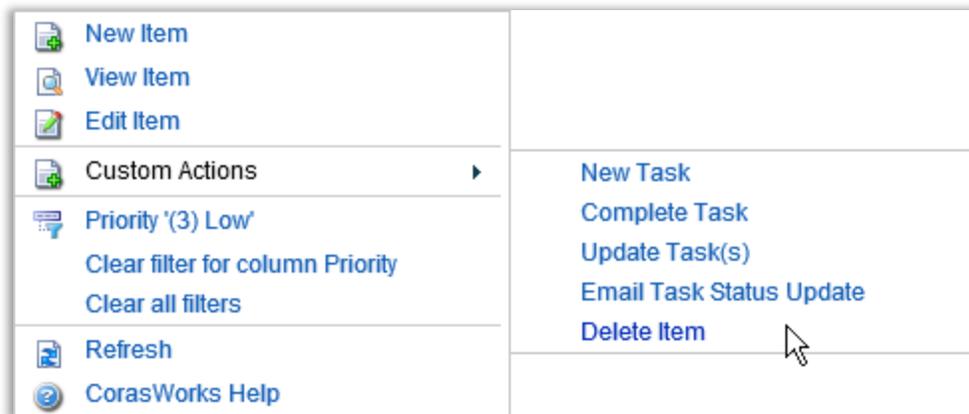
Note that there is not an expand all or collapse all option.

Data Table

The information within the Basic Grid is displayed in row and column format within the Data Table section. The information within the Data Table section can be formatted in a variety of ways and offer options for adding new items, running Actions against the information, or to see version options.

Context Menu

When a user right-clicks on an item within the Basic Grid, they are presented with a Context Menu. This is a menu of options specific for the selected item. The options differ based upon the type of items being displayed, the options enabled by the builder when placing the Basic Grid onto the SharePoint page, and the standard SharePoint options. To use, select a menu option.



Context Menu Options

- Ability to create New Items, as well as View or Edit the currently selected item (where the pointer was when the right-mouse button was clicked).
- Open the currently selected document.
- On demand filtering based upon the selected item or removing filtering from the Basic Grid.
- Seeing the Versions of the selected document, plus checking the document in or out.
- Refresh the information being displayed within the Grid.
- Running Custom Actions created for the Basic Grid by the builder.

Additional Options

Each row of data can offer additional options for the user. These include:

- **Checkboxes:** The checkboxes are used for running Actions. To run an Action against one or more items, place a check within the checkbox for the item and then choose the Action from the Actions Menu found in the Views, Actions, and Search Toolbar.
- **Item Type:** This is an icon found on the left side of the row. The icon is an image identifying the file or list type for the item in the row. When enabled, this option uses the item type icons supplied by SharePoint.
- **View Item:** Click on this icon to view the item's values.
- **Edit Item:** Click on this icon to edit the item's values. This option may be enabled for users who do not have permission to edit the item.

However, any changes entered by users without permission to edit the item will not be saved.

- **Hyperlink:** One of the columns within the Basic Grid may have a hyperlink. Click on the link to view information, open a document, or perform a function as defined by the builder of the component.

Refresh, Print, And Export Bar

The Refresh, Print, and Export Bar offers the ability to refresh, print, and/or export the Basic Grid's information. These functions are controlled by the icons within the bar.

Refresh Icon

Click on the refresh icon to reload the information within the Basic Grid. This option does not reload the entire web page; instead, the columns of data within the Basic Grid are updated based on the values within the source list(s).

Print Icon

Click on the print icon to print the information within the Basic Grid. When clicked, the web browser will open a new panel containing only data from the Basic Grid. The navigational items from the SharePoint page will be excluded, as will any other web parts.

Once the panel is opened, a print window will be presented to the user all allow for printer selection. Select the printer and click on the print button. Close the panel to return to the Basic Grid.

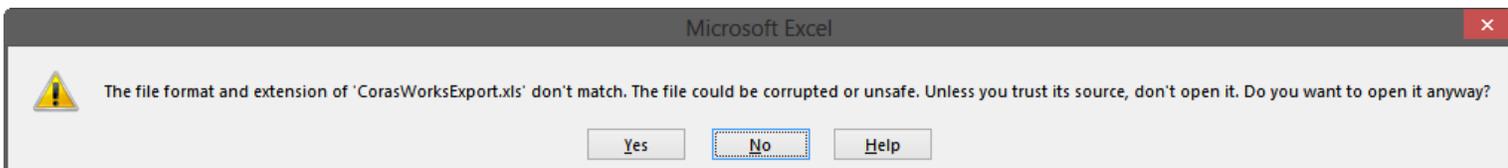
If there are multiple pages within the Basic Grid, note that only the current page will be printed. If additional information is required, exporting may be a better choice.

Exporting Icons

When enabled, the Basic Grid supports exporting to four different file types with each type represented by an icon. The file types are:

- **Microsoft Excel:** This is a spreadsheet format.
- **Microsoft Word:** This is a document format.
- **Portable Document Format (PDF):** This is a document in PDF format.
- **Comma-Separated Values (CSV):** This is a text file with the Basic Grid values separated by a comma. This is a good option when the information needs to be imported into another application.

To export the information within the Basic Grid, click on an export icon and save the resulting file. Note that exporting data from the Basic Grid differs from printing in that the export will contain all pages of data while printing will print the current page's information only.



When opening exported files from within Microsoft Excel or Microsoft Word, the application may show an error similar to the one displayed above indicating that the file format and extensions for the file does not match, the file could be corrupted, and/or the file may be unsafe. This message is expected from the Microsoft application as it is noting a difference in formatting for the file.

It is safe to continue to open the file. The resulting file will operate as normal within the application.

Paging Information Bar

The bottom of the Basic Grid may have a section dedicated to paging options. If the Basic Grid is configured to display information in pages, the Paging Information bar allows the user to switch between pages or alter the number of items per page.



The paging control in the bottom right corner of the page has arrows to move between the pages. The single arrows pointing to the right and left allow the user to go forward or backward through the pages. Clicking on the double arrows permit the user to go to the first or last pages of the Basic Grid information. Finally, the page number displayed within the arrows allow the user to click on a specific page.

The field in the middle of the bar allow for the user to jump directly to a page. Enter the page number into the Page field, then click on the Go button.

The Page Size field controls the number of items displays on each page. It defaults to the value selected by the builder who placed the Basic Grid onto the SharePoint page. Enter a different number into the Page Size field, then click the OK button to see more or less items on each page. This change will impact the current user only and is reset when the web page is reloaded within the browser.

CORASCloud™ CORASWorks® v11 End User Guide

The numbers on the right side of the Paging Information Bar represent the total number of items as well as showing which of those items are currently being displayed.

Using A Basic Calendar Display

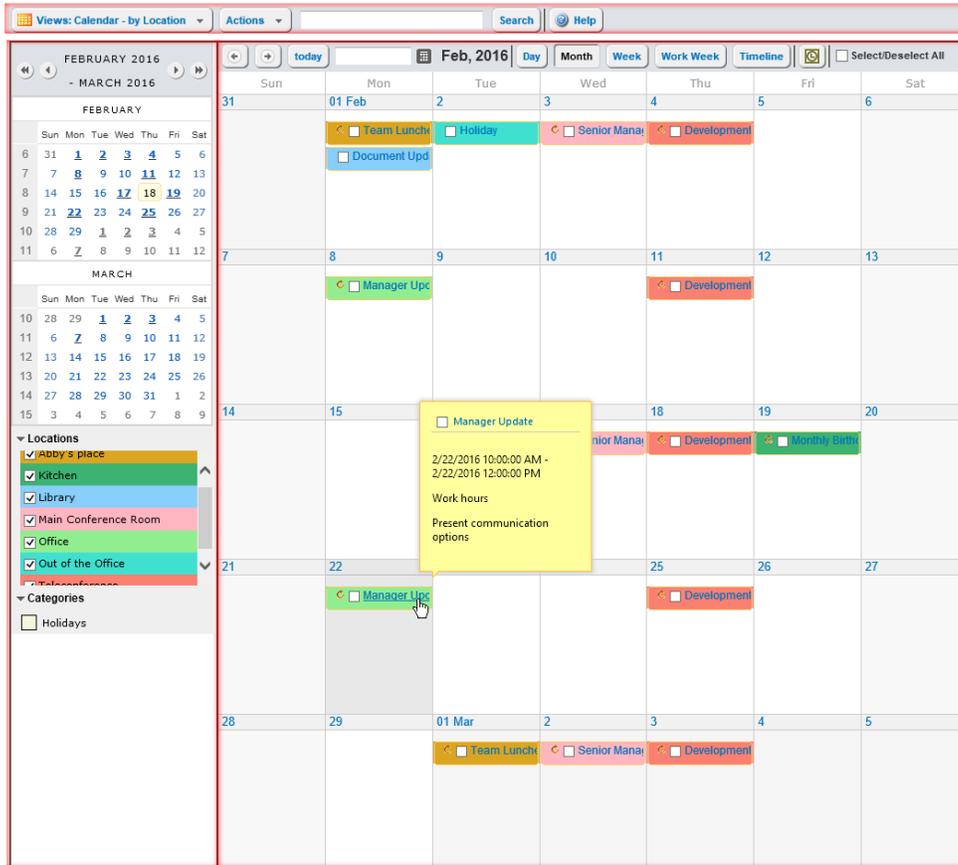
Introduction

Like the Basic Grid, the CORASCloud CORASWorks v11 Basic Calendar connects and consolidates information throughout workplaces built using SharePoint, displaying into a calendar format. While primarily designed to show information from Calendar lists, the Basic Calendar can collect information from different list types.

The Basic Calendar can display items in a variety of formats: Monthly, Weekly, Daily, and Timeline views are available. All CORASWorks components use the SharePoint object model, so users only see the information to which they have access. If a user does not have access to see a list or site, the items from the list or site will not be included in the Grid Display.

Basic Calendar Pieces

The Basic Calendar can be broken into three sections:



The top section of the Basic Calendar is the **Views, Actions, And Search Toolbar**. It allows for the selection of alternate Views for the data, Actions to run against the information, and the ability to run text-based searches against the metadata being returned by the Basic Grid.

The panel on the left side of the Basic Calendar is the **Resources Section**. This area contains options such as the mini calendar, resources, and categories.

The main body section is known as the **Calendar Section**. This is the location where the events or items are displayed.

Working with the Views, Actions, and Search Toolbar

The Views, Actions, and Search Toolbar is shown at the top of every Data Display, unless the builder chooses to disable it. A sample toolbar with all possible options and formatting is shown below.



1. Click **Views** to see a list of all available views for this Data Display. The currently displayed view is marked with a bullet to the left. You can hover over a view name to see the description, if one is available. Click on any view name to display that view.
2. Click **Actions** to access a list of all of the actions that have been made available for this view. If you do not see this on the toolbar, then no actions are available. To execute an action:
 - a. Place a check mark in the box within the item that you want to run the action against. Or, if you want to run the action against all of the items on the current page of the Data Display, choose the select all check box.
 - b. Click **Actions** and then click on the name of the action you want to run. You can hover over an action name to see the description, if one is available.
 - c. If the action definition requires you to enter any information, an action entry form is displayed. Provide the appropriate information and click **OK** at the bottom of the form.
3. Use the **Search** area to locate items that meet your criteria. If you do not see this on the toolbar, then it has been disabled by the builder. If

you do see the Search area, type the content you want to search for and then click **Search**.

- You should be aware that this search only looks at metadata (the values in the columns that were selected by the builder); it **does not** perform a full-text search of attached documents or other files. If you want to perform a full-text search, you will need to use the standard SharePoint search, located in a box with a magnifying glass near the top right corner of most sites.
- If you see a message stating “**Please execute a search to see results,**” the builder has configured the display to require a search to be performed before any results will be displayed. (For example, you may need to select a customer before returning the transaction records for that customer.) This is often done to improve response time.

4. Click the **Help** button to access the online help for the Data

Display Resources Section Information

The Resources Section is an optional panel than is displayed on the left side of the Calendar display. When enabled, the panel can contain the following (when enabled):

- **Mini Calendar:** A small calendar displaying one or more future months. Dates with events are displayed in bold. Click on the date to change the main calendar display to that date. The single arrows above the mini-calendar pointing to the right and left allow the user to go forward or backward monthly through the mini-calendar.

- **Resources:** When enabled, this option shows color-coded enabled resources available within the main Calendar. To temporarily display or hide a resource from the Calendar, click on its checkbox.
- **Categories:** Similar to Resources, the categories permit for color-coding calendar items. This is a display-only option and the categories cannot be hidden.

Calendar Section

The Calendar Section is the primary data display area of the Basic Calendar. The information shown based upon dates and times. The information may be from a Calendar list or any other list or library.

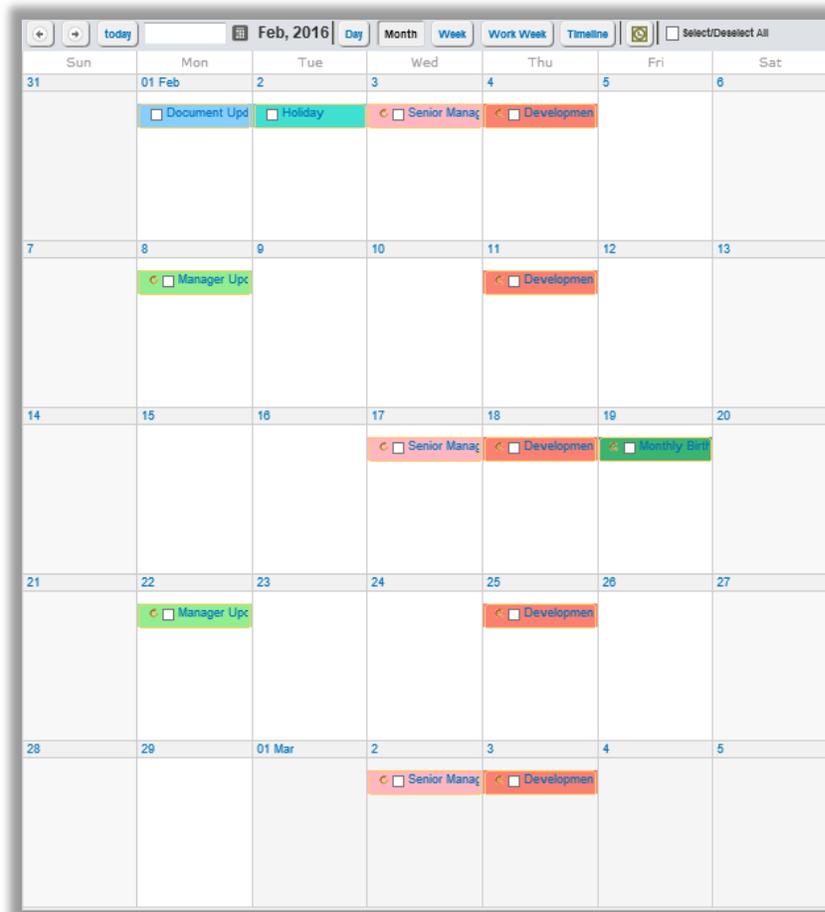
Navigation Panel

The navigation panel is found at the top of the Calendar Section area and it displays the currently selected timeframe. The options in the Navigation Panel include:

- **Previous/Next buttons:** These arrow buttons are found on the left and their behavior changes based on the Calendar view type being displayed. In Month View, they allow for navigation to the previous or next month. In Week View the buttons navigate to the previous or next week.
- **Today button:** Click to change the Calendar to show today's activities.
- **Date field:** This field permits manual entry of the date required or use the calendar button to its left to select a date.
- **Current timeframe:** This is a display-only section indicating the currently displayed timeframe. Changes for each view type.

- **Day, Week, Work Week, Month, and Timeline Buttons:** Click to change the current view to a different type.
- **iCal export button:** Clicking this button will result in the current view to be exported in iCal format. To use, click on the iCal button, save the exported information, and then open or import into a calendar application such as Microsoft Outlook.
- **Select/Deselect All checkbox:** This option is used when running Actions. Select the checkbox to place a check into all items displayed within the display or remove the check to remove the checkmarks from the items.

Calendar Display Options - Month View

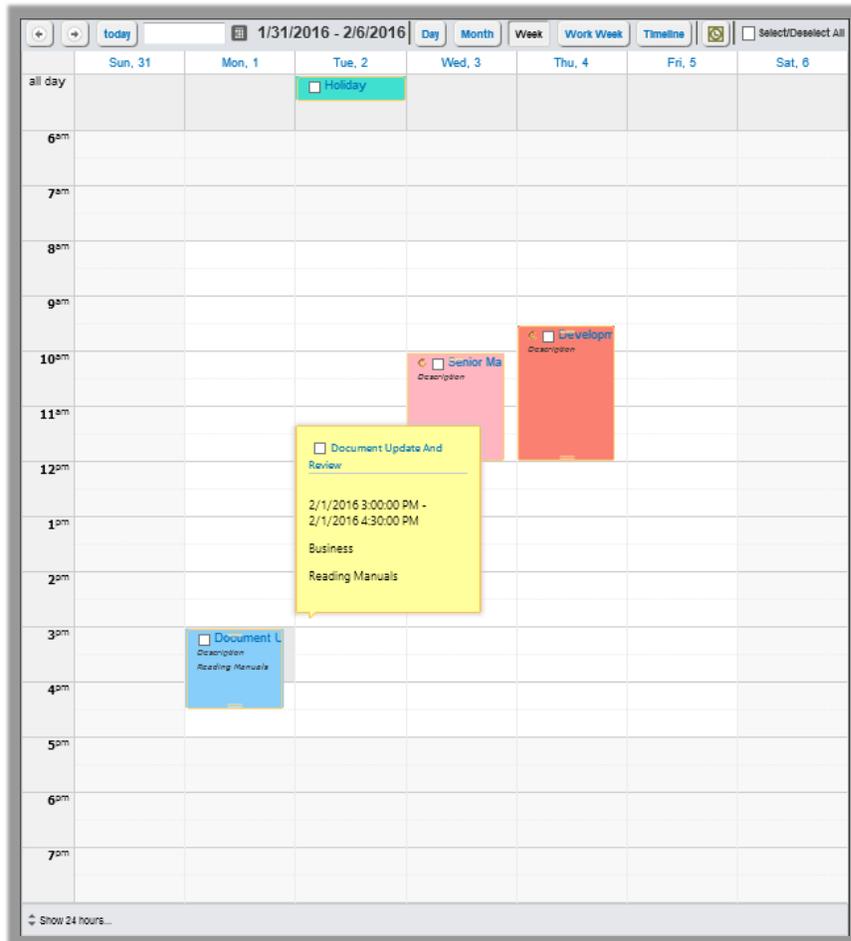


The Month View is the default view for the Basic Calendar, unless changed by the builder who placed it onto the page. Information is displayed based on the day of the current month.

The Month View is broken into weeks, generally starting on Sundays. Days from the preceding or following months are displayed if they fall into the first or last week of the current month.

To change the month being displayed, click on the Last Month or Next Month buttons in the navigation panel found in the top of the display.

Calendar Display Options - Week View and Work Week View



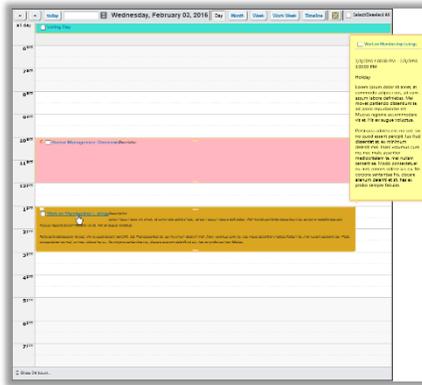
The Week View and Work Week View display information for items occurring within the selected week. Information is organized by days of the week, displayed across the top.

In the Week View the week begins with Sunday and ends on Saturday, unless changed by the page's developer. The Work Week View displays items from Monday through Friday.

If an activity lasts the entire day, it is displayed at the top of the day's column. All other events are shown based upon the time of the day running along the left side of the display.

To change the displayed week click on the Last Week or Next Week buttons in the navigation panel at the top of the display.

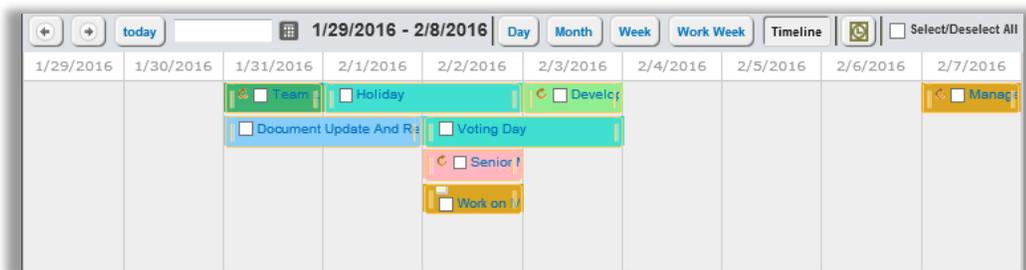
Calendar Display Options - Day View



The Day View shows items occurring within the selected day. If an activity lasts the entire day, it is displayed at the top of the day's column. All other events are shown based upon the time of the day running along the left side of the display.

To switch between 24 hour and business hours, click on the Time Show icon located at the bottom left corner of the display. To change the displayed day click on the Yesterday or Tomorrow buttons in the navigation panel at the top of the display.

Calendar Display Options - Timeline View



The Timeline View shows the items occurring over the next ten days, in a list-like format organized by the day. It is possible to move forward and

backward through the days using the navigation panel at the top of the display.

Basic Navigation Components

Introduction

The CORASCloud CORASWorks v11 product includes a series of components meant to help the user navigate and use the SharePoint environment. Each offers different options for display and user capabilities. As with the other components, the options offered and the presentation styles will differ, dependent upon the selections made by the user placing it onto the SharePoint page.

Menu Navigation Component



As its name implies, the Menu Navigation component displays information in a menu style. The menu may be using tabs or text. In either case, its use is straightforward: hover or click on a tab or its menu selection. Hovering over the tab or menu item should display descriptive text, while clicking will either open its submenu or load the requested page.

Tree-View Navigation Component



The Tree-View Navigation component displays sites and subsites, as well as their lists and libraries, in a tree-like format.

To expand a site structure, click on the icon appearing to the left of the site icon. To go into a site, list, library, or administration option, click on its title.

The Tree-View Navigation respects SharePoint's permissions. If a user does not have permission to see a site or list, or does not have administration permission, they will not see those items.

Note: When enabled, right-click on a navigation item to see a menu of options for the selection. Options include the ability to open the link in a new browser window or to access the settings for the list or site (permissions dependent).

Up To Navigation Component



The CORASWorks v11 Up-To Navigation component makes it easy to navigate to parent sites located “above” the current site.

To use this component, click on the “Site Navigation” text button and click on a site. The browser will load the selected site.

Using The Application Designer

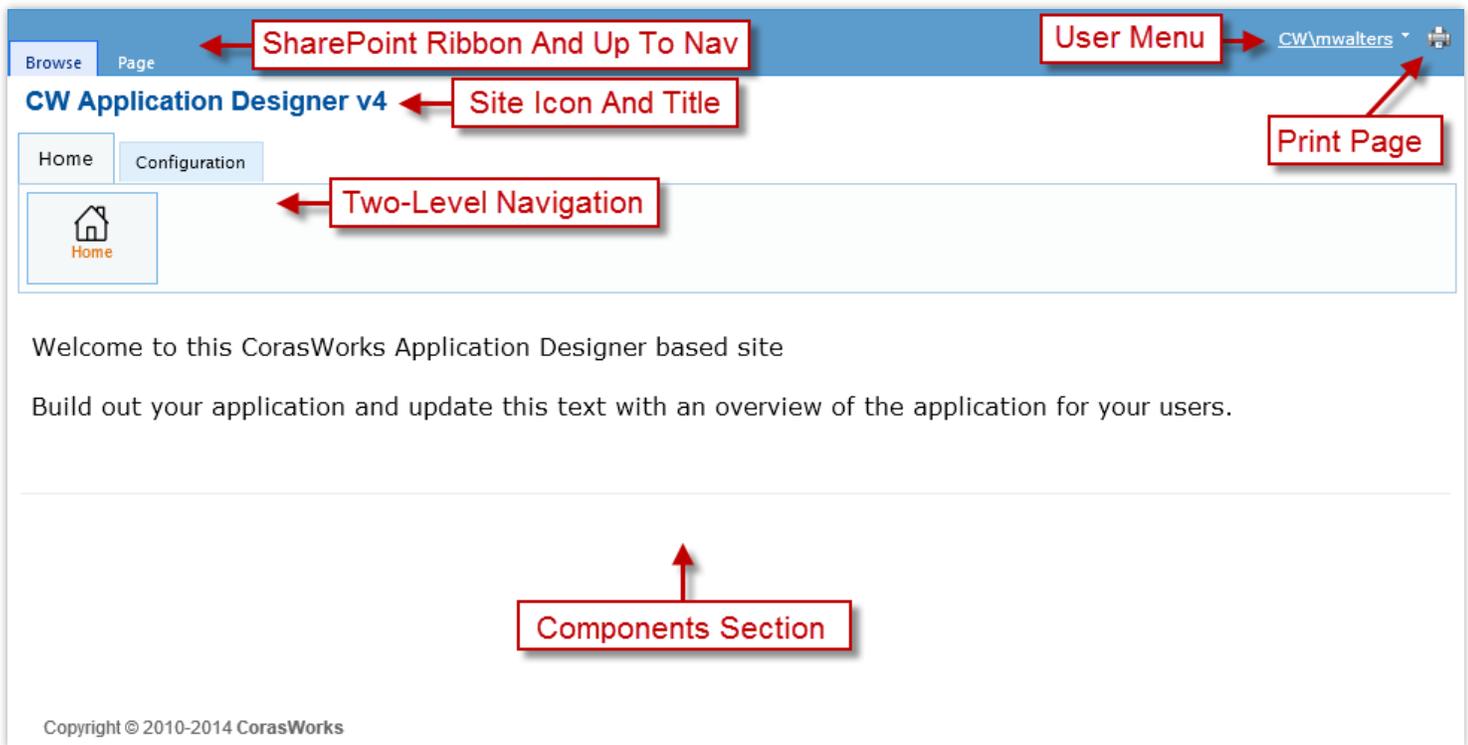
Introduction

The CORASWorks Application Designer Solution is a single-site based approach to building applications within the SharePoint. It includes a two-level navigation structure with tabs and buttons. In addition to using the other components within this document, it also includes integrated charting.

Application Designer Solution Pages

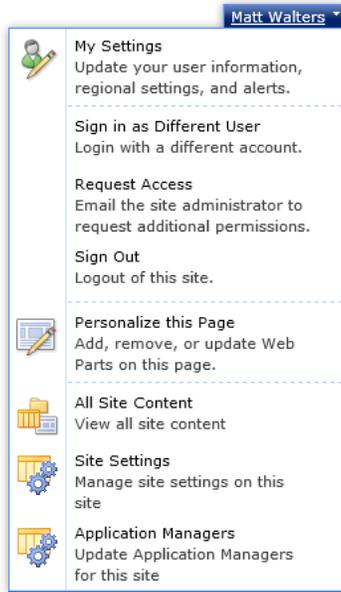
In general, the CORASWorks Application Designer Solution v4 pages are the same as a traditional web part page. When the page is in edit mode, SharePoint and CORASWorks components can be placed into the web part zones. Most editing, though, is done through the Design Canvas.

What follows is an overview of the options for the pages within the template.

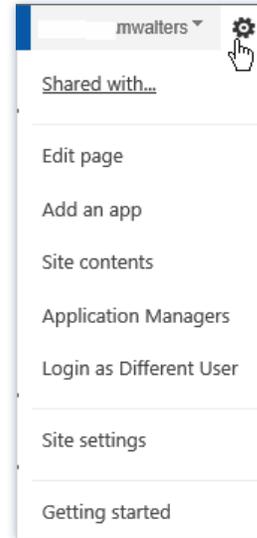


User Menu

The User Menu is a drop-down menu serving as a combination of the “Site Actions” and “My Settings/Welcome” drop-down menus of a traditional SharePoint page. The options displayed will differ, depending on the permissions for the user within the current site.



**User Menu – SharePoint
2010**



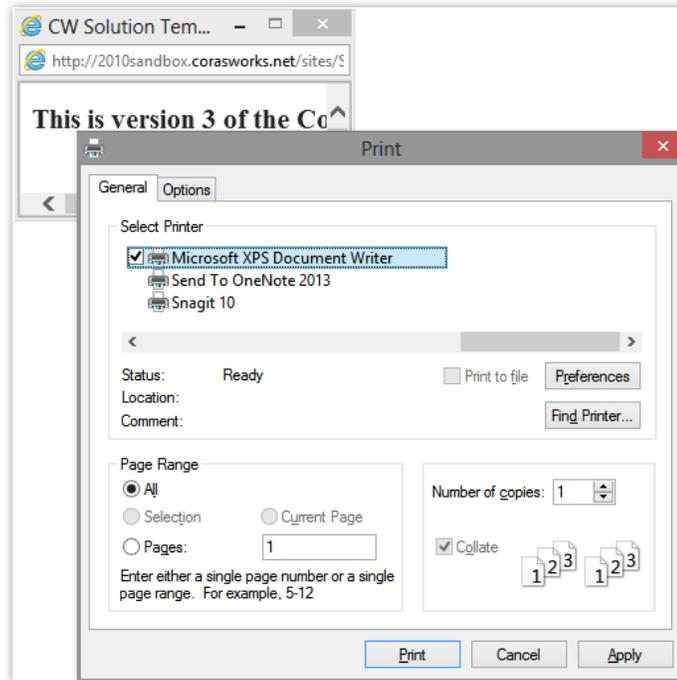
**User Menu – SharePoint
2013**

To access the menu in SharePoint 2010, the user clicks on their name. In SharePoint 2013, click on the gear/sprocket icon in the top right corner of the page.

The resulting User Menu includes options to sign out of the site, view all site content, personalize the current page, and access the Site Settings page for the site. Other options will appear, dependent upon the permissions the user has within the site and the SharePoint options enabled.

Note: When the user chooses any of these pages, they will be taken out of the Application Designer Solution's navigation. The user will see the traditional SharePoint pages.

Print Page Icon for SharePoint 2010 Only



Click on the Print Page icon in order to send the contents of the web page to the printer. The elements outside of the web part zones (navigation, title, etc.) will not be printed.

When the icon is clicked, a small web browser window is opened and the print window is opened. Choose the printer that is the destination for the output, then click on the Print button. The print window and browser window will close, returning the user to their regular browser page.

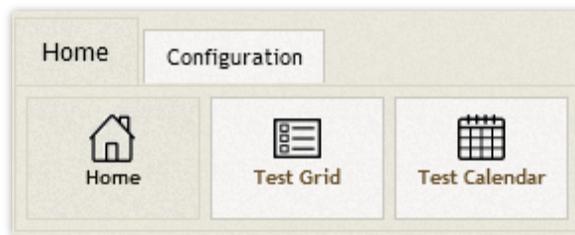
SharePoint Ribbon Bar And Up To Nav

The ribbon bar that is provided is the same used throughout SharePoint. It has not been customized for use within the Application Designer Solution. Although the CORASWorks components do not use the ribbon bar for customization, it is included for use with the SharePoint options. To place the page into edit mode, click on the “Page” link and choose “Edit Page”.

By default, the SharePoint Up To Nav button is disabled. If it is enabled, users can click on the icon to see the parent sites above the current site.

Two-Level Navigation – Tab and Button

The CORASWorks Application Designer Solution v4 uses a special type of navigation, called “Two-Level Navigation”. As the title implies, the navigation supports two levels of navigation only.



The first level is the tab navigation. Within each tab is a buttons-based navigation. When a user wants to go to a different page or perform an action, they first click on a tab. A series of buttons assigned to that tab are loaded. The user then clicks on the appropriate button to load their page or action.

Note: The tabs cannot have a link to a page. Instead, the tabs serve as a container for their buttons.

Conversely, the buttons will not have any sub-buttons or menus. When a button is clicked, a page is loaded or an action is run.

By default, the tabs and buttons are displayed on the left side of the page. Another available option for the Two-Level Navigation is to have the tabs on the right-side of the pages. In either format, the use is the same: choose the tab and then its button.

Two-Level Navigation – Accordion Style



There is also a completely different type of navigation offered: Accordion Style. With this style, the navigation is displayed vertically along the left side of the page. When a user clicks on a container, the accordion section expands to show that section's options.

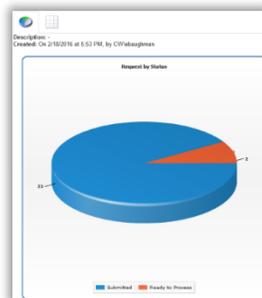
Click on a link to open the page or to activate the action.

Components Section

The area under the Two-Level Navigation tabs/buttons (or to the right of the Accordion navigation) is where the components are located for the page. The information within this section may be contained within a Basic Grid, Basic Calendar, or a chart.

For information on using the Basic Grid and the Basic Calendar, please see their sections within this guide.

Application Designer Charting



The Application Designer includes an integrated charting option. Pages with these options will either have a single chart or will feature multiple charts in a dashboard format. Regardless of the type of chart (single or dashboard) the charts offer the same interaction.

Interacting with Application Designer Charts

The Application Designer charts display information in graphical format and can be enabled to support drill-down capabilities in order to see the underlying data. When a user clicks on an element, the information for that element is displayed.

To see information about a part of a chart, place the mouse pointer over the slice, column, or row. A tooltip will be displayed with data on the selected charting piece. The information in the tooltip differs depending on how the chart was formatted.

To drill-down to see the underlying data for a piece of the chart, click on the slice, column, or row. A second section will load on the page, with information displayed in row and column format. To see details on a piece of data, click on its row. A small panel will load with details on that item.

The details panel can be closed via the Close button. To return to the chart, click on the chart tab located above the rows of information.