

## CorasWorks® v11 Essentials Distance Learning

CORASWORKS

THE NEXT STEP IN THE EVOLUTION OF COLLABORATION


### Course Outline

CorasWorks distance learning training is designed to help students leverage the CorasWorks platform to either build collaborative applications or extend and enhance existing sites on Microsoft® SharePoint®.

During this intensive course, students will learn the core features and design principles around how to build, implement, and manage collaborative business applications and solutions within a connected workplace. The course is based on the CorasWorks v11.x platform and how it can be leveraged to better support a spectrum of organizational needs. Students explore real-world scenarios and learn tips and tricks to optimize SharePoint/CorasWorks implementations. They will also learn how to extend and enhance the Microsoft SharePoint platform to enable better collaborative solutions that are more robust, better connected, more quickly deployed, and more soundly architected.

#### By the end of this course, students will be able to:

- Build basic collaborative applications that deliver SharePoint data, and external data, the way users want to see it, where they want to see it, and enable them to act upon it. While learning the various information displays, aggregation options, connections, and actions, students will experience how to :
  - Select and configure CorasWorks Basic and Advanced web parts for rapid solution development without coding (e.g., the Tree, Spreadsheet, Calendar, and Chart style displays), and alter those configurations to meet a vast array of organizational needs.
  - Alter the data display with simple point, click, and type settings within the Basic Components' administration interface.
  - Pinpoint information by targeting specific data from multiple sites and lists and applying filtering to that aggregate data.
  - Drive business processes and enable an active workplace using CorasWorks actions
  - Create custom roll-up web parts through the browser using the Basic Component Display Wizard.
  - Implement an External Data Provider (EDP) using the Advanced Components.
  - Implement an EDP with Web Services using the Advanced Components.
  - Implement a Workplace Lookup using the Advanced Components.
  - Implement a Basic Grid Display connected to external data.
  - Implement the Advanced Grid Display Adapter as part of the Advanced Components.
- Enhance workspace designs for more robust point solutions that are easier to navigate and manage.
- Design information dashboards to support organizational needs.
- Customize workplace navigation for an improved user experience and better workplace management.



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### Who Should Attend?

This training course is designed for IT and business department staff who have purchased the CorasWorks v11.x platform and want to learn how to configure, build, customize, and/or support collaborative business applications and workplaces using the platform.

The training is divided into two core sections. The first six instructor-led sessions focus on the Basic Components (previously associated with the CorasWorks Workplace Suite product), which have wizard-driven configurations that don't require advanced technical skills. The Advanced Components are trained through a self-paced format via videos and hands-on lessons, and require more advanced technical skills (i.e., working with XML). A live question and answer session is conducted to support the Advanced Component lessons.

### Prerequisite

As a prerequisite for the training, all participants should have a working knowledge of Microsoft SharePoint (either WSS or MOSS). For the advanced components, a basic understanding of XML is beneficial but not required.

### Course Outline – CorasWorks Basic Components

#### The following topics will be covered in Session 1:

- End user enablement for users across the organization
- End user enablement for team members
- End user enablement for managers
- CorasWorks Grids
  - How to use the Display Wizard to configure a grid, including data selection and presentation
- Filtering & Grouping
  - Refining the display for better usability and performance

#### On completion of the Session 1 and the self-paced exercises, you will be able to:


- Work with the CorasWorks Grid, Calendar, and Chart from an end-user perspective
- Navigate to site displays using menu and sub-menu options
- Execute CorasWorks Actions to create items, modify items, and send updates
- Modify a grid style display from an end user perspective changing:
  - Column order
  - Filter criteria
  - Grouping criteria
- Modify a chart type and display data as an end user
- Add new items and execute actions using the CorasWorks toolbar and context menu



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- Add and configure a CorasWorks Grid
  - Defining how the display looks: The desired columns order and size
  - Defining where the data comes from: One or more lists from one or more sites
  - Filtering and grouping the data

### The following topics will be covered in Session 2:

#### Configuring calendar and chart displays

- How to connect to SharePoint Data with a CorasWorks Calendar Display
  - Configuring the default “empty view” with column mapping
  - Selectively targeting sites and lists for the display
  - Making users more productive using color codes and “resources”
- Creating multiple views for ease of use
- Saving time by repurposing displays – adding a configured web part to the Web Part Gallery
- How to connect to SharePoint Data with a CorasWorks Chart Display
  - Available types of charts
  - Configuring a basic pie chart using a dynamic configuration
  - Fine-tuning the chart by adding a title, changing the size, and changing the data label type

### On completion of Session 2 and the self-paced exercises, you will be able to:

- Configure calendar displays with color-coded categories and resources for improved usability
- Selectively choose the lists and libraries from which the data is displayed
- Easily create additional views by copying and modifying existing views
- Reuse and repurpose displays by storing them and accessing them in the Web Part Gallery
- Configure and fine-tune a chart display's Actions using the Actions Wizard and repurpose existing Actions.

### The following topics will be covered in Session 3:

#### Configuring, Applying and Modifying Actions


- How to setup for, create, and apply CorasWorks Actions
- Creating the actions library
- Configuring actions with the Actions Wizard
- Applying actions to a grid display
- Modifying actions



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### On completion of Session 3 and the self-paced exercises, you will be able to:

- Configure the Create List Item, Modify List Item, Edit List Item, and Email Action types
- Action-enable a CorasWorks display
- Create or modify an action to:
  - Send an email (automatically)
  - Automatically update columns without users entering the values
  - Show only desired columns (trim the form)
  - Display columns as read-only


### The following topics will be covered in Session 4:

#### Managing a process using views and actions

- Bringing multiple CorasWorks data displays and actions together to drive business processes
- What are stage gates and how do they work?
- Working with a CorasWorks Starter Template
- The importance of the data structure in the list and the implications of changing the structure

### On completion of Session 4 and the self-paced exercises, you will be able to:

- Create a list data structure to capture the information needed to drive and manage a process
- Manage the data associated with a multi-stage process in a single list, and hide that list to maintain the integrity of the process
- Kick-off a process using a CorasWorks action via the Action Launcher
- Send a notification to the assignee when a request has been created
- Configure views based on filters to target information associated with a particular stage
- Configure actions to move items forward (approve or resubmit) or backward (rework), or stop items in the process (reject)



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### The following topics will be covered in Session 5:

#### Distributing a Process

- Distributed Process: Executing business processes from where the user is working (e.g., other sites or site collections)
- Reusing, repurposing, and porting CorasWorks displays, views, and actions for improved efficiency and productivity
- Centralized management with CorasWorks Central Views and Global Variables for increased manageability

### On completion of Session 5 and the self-paced exercises, you will be able to:

- Configure CorasWorks displays and actions for importing/exporting or adding to the Web Part Gallery
- Distribute stage gates, the displays and actions related to a stage in a process, to one or more sites where reviewers/approvers are working
- Apply CorasWorks Global Variables for ease of configuration and manageability
- Apply CorasWorks Central Views to provide consistency and manageability when you need a single display used in many places
- Group items with color-coded headings and define only the groups you need through “static” settings

### The following topics will be covered in Session 6:

#### Enhancing and extending sites and applications

- How to modify the tab navigation in a starter template
- How to copy a central view as a local view
- How to create chained actions and publisher actions
- How to automate actions with the List Activation and Timer Activation Wizards
- How to use global navigation across an environment
- How to use tree navigation for better administration

### On completion of Session 6 and the self-paced exercises, you will be able to:


- Use the CorasWorks Menu Navigation to create structure and organization within a site or application for improved usability
- Repurpose a central view as a local view to save time creating new views and provide the flexibility to manage them locally
- Chain two or more actions together to streamline common work activity or business process
- Manually or automatically update and copy item(s) from one or more lists to another list executing an archiving process



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- Create and manage a global navigation structure using the CorasWorks Starter Template for SharePoint 2010
- Centrally manage the global navigation structure so updates to the navigation can be made in one place and be automatically applied across multiple sites
- Configure the CorasWorks Tree Navigation to more easily move up and down sites and navigate to specific lists or administration features for easier site access and management

### Course Outline – CorasWorks Advanced Components

The CorasWorks Advanced Components are learned through viewing self-paced and working through corresponding self-paced lessons. Students are given a two-week period after the completion of the Basic Component sessions to work through six Advanced Component modules. On the Friday following the two-week self study, a 90-minute question and answer session is held via LiveMeeting to address questions related to the lessons or the Advanced Components in general.

The six Advanced Component lessons are as follows:

- Module 1 - v11 Advanced Components and Training Overview
- Module 2 – Implementing an External Data Provider (EDP)
- Module 3 – Implementing an EDP with Web Services
- Module 4 – Implementing a Workplace Lookup
- Module 5 – Implementing a Basic CorasWorks Grid Display
- Module 6 – Implementing an Advanced Grid Display Adapter

### Additional Information

**Session:** Seven sessions, each consisting of 90-minute delivery via telephone and Microsoft LiveMeeting. Between lessons, students will be provided with a training manual and a personal training environment for supplemental learning and hands-on exercises.

**Term:**

- Week 1: Basic Components Session 1, 2, and 3
- Week 2: Basic Components Session 4, 5, and 6
- Week 3 – 4: Advanced Component Student Self-Paced Learning
- Week 5: Advanced Component Session 7 (Q& A only, no formal instruction)

**Course fee:** \$1,495 per student (20% off for customers with active Support & Maintenance)




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### Fee includes:

- **Instructor-facilitated Microsoft LiveMeeting sessions**
- **30 day instructor e-mail support**
- **Exercise Manuals** - Comprised of in-depth, step-by-step exercises with screen captures for guidance. The training manual is in an electronic .pdf format.
- **Hosted Site Collection** – CorasWorks-hosted site collection for each student available for 30 days from the course start date.
- **Communication Fees** - LiveMeeting and Toll Free telephone
- **Recordings** – The sessions will be recorded and posted on the hosted site for download or playback by the students.

### Conditions:

- Training materials and presentations are restricted to students only, and for the sole purpose of Distance Learning. Training materials include all presentations, recordings, lesson plans, and training manuals included in the program.
- No training materials may be distributed or reproduced without written authorization from CorasWorks. Electronic copies of materials may be printed for the sole use of the registered students.
- Student registration must be completed 7 days prior to Session 1.

Please contact your CorasWorks Account Representative or email [training@corasworks.net](mailto:training@corasworks.net) for additional details or a schedule of upcoming CorasWorks Distance Learning courses.



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