



CorasWorks® Workplace Suite™ Essentials Course

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THE NEXT STEP IN THE EVOLUTION OF COLLABORATION

About the CorasWorks Workplace Suite Essentials Course

CorasWorks is pleased to offer a two-day, intensive training course designed to help clients and partners fully leverage the CorasWorks Workplace Suite to build collaborative applications and an integrated workplace on Microsoft® SharePoint®.

During this intensive two-day course students will learn the core features and design principles around how to build, implement, and manage collaborative business solutions within a connected workplace. The course is based on the CorasWorks Workplace Suite v10 – Enterprise Edition which extends and enhances Microsoft SharePoint products and technologies 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 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 2-day course, students will be able to:

- Build collaborative applications that deliver SharePoint 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 standard web parts for rapid solution development without coding (e.g. the Tree-View, Spreadsheet View, Calendar View, and Chart View), and alter those configurations to meet a vast array of organizational needs.
 - Alter the data display with simple point, click, and type within the CorasWorks tabbed administration interface
 - Deliver very targeted information from different sites and site collections and filtering that data
 - Use a wizard to customize e-Mail Notification for tasks, lists, and libraries to leverage existing list data as part of work assignments, reminders, informational purposes, and more.
 - Drive business process and enable an active workplace using CorasWorks actions
 - Create custom roll-up web parts through the browser using a wizard
- Enhance workspace designs for more robust point solutions that are easier to navigate and manage.
- Design information dashboards to support organizational needs.
- Create role based dashboards (Personas) to deliver slices of information from across the workplace for view by a specific role, where they want to see it, how they want to see it, and enable them to act upon that information.
- Customize workplace navigation for an improved user experience and better workplace management
- Centrally manage workplace features and configuration for increased manageability, streamlined administration, and feature reusability.
- Construct an efficient workplace configuration using basic design patterns.
- Learn the many available resources and job aides to support your success post training.



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Who Should Attend?

This training course is designed for IT and business department staff who have purchased CorasWorks Workplace Suite and want to learn how to build and customize collaborative workplaces using the CorasWorks Workplace Suite v10 – Enterprise Edition.

Note: As a prerequisite for the workshop, all participants should have a working knowledge of Microsoft SharePoint.

Course Outline:

Day One – Overview

Day one covers the topics outlined below from the Introduction, Chapter One and Chapter Two of the Student Manual. The goal of the first day is to give students a sound foundation regarding the software capabilities and broad application possibilities. Students both experience the software from an end user perspective and explore the many configuration options and features within the CorasWorks Wizards - enabling customization to meet unique organizational requirements.

Introduction – The Productivity Challenge

An introductory presentation and discussion addresses the common productivity challenges for organizations and how CorasWorks and the SharePoint platform help to address those challenges. Key topics include:

- Do Less, Accomplish More Faster than Before
- Why CorasWorks uses a Departmental Workplace Example to experience and learn the software.
- The Five Phases to Productivity: Requirements, Planning, Execution, Implementation, and Maintenance.
- Avoiding SharePoint Pitfalls
- Three Keys to Success: Execute Against the 5 Phases, Plan Big and Start Small, and Leveraging the Experts

The Goal: Though the introduction section students receive a high level overview of “Why CorasWorks,” including how the training addresses the productivity challenges by learning the broad capabilities of the software and its implementation within the context of a prebuilt Departmental Workplace example.

Chapter One – End User Enablement

Students begin hands on exercises by experiencing the CorasWorks software from an end user perspective within the example departmental solution. Key topics include

- End User Enablement for Users across the organization;
- End User Enablement for Team Members;
- End User Enablement for Managers.

On completion of Chapter One students 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;



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- Modify a Grid Style Display from an End User perspective changing; Column Order; Filter Criteria, and Grouping Criteria;
- Modify a Chart Type and Display Data as an End User;
- Add New Items and Execute Actions using the CorasWorks Context Menu;
- Escalate Items and drive business process as a Team Member;
- Manage Activities, Requests, Escalations, and Reviews as a Manager.

The Goal: The goal of the End User Enablement chapter is to experience the various CorasWorks Displays (Grid Displays, Calendar Displays, Chart Displays) and navigation options. Experiencing the software from the end user perspective creates greater awareness of what is possible with CorasWorks and an understanding of key considerations regarding user adoption and usability when creating collaborative applications with CorasWorks.

Chapter Two – Configuring the Displays

After experiencing the software students learn how CorasWorks Displays and Actions are configured using CorasWorks Wizards, all through the browser. Key topics include:

- CorasWorks Panel Template
- Using Web Part Pages to add and manage displays
- Creating Displays for:
 - CorasWorks Grids
 - Scope – Line of Site
 - Schema – Modifying Schema
 - Filtering
 - CorasWorks Calendars
 - Scope – Selective
 - Categories
 - Resources
 - Charts
 - Creating Multiple Views
 - Creating Different Chart Types of the same data
- Defining and Applying Actions to Displays
- Applying an Existing Action to a Display
- Creating Actions with the Actions Wizard

On completion of Chapter 2 Students will be able to:

- Add and configure a CorasWorks Grid, Calendar, and Chart
- Use the CorasWorks Display Wizard to configure and modify displays
- Aggregate data across sites and site collections
- Configure a Display's Schema to define the columns appearing in a display and determine the Lists or Libraries included within the display
- Manage the scope, or Lists and Libraries included in a display, using Line of Site or Selective return options
- "Fine Tune" a CorasWorks display using Grouping and Filtering
- Apply color codes for dynamic Resources and Static Categories within an aggregated Calendar Display.
- Create various types of CorasWorks charts and enable End User features
- Create customized Actions using the Actions Wizard and repurpose existing Actions



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The Goals: The goal of Chapter Two is to learn core capabilities and configuration options that can be applied within the various display types, in addition to learning the unique functionality of each display type. Once information is displayed, CorasWorks Actions can be defined and applied to facilitate common work activities and drive business process.

Day Two – Overview

Day two builds upon the foundation exercises from day one, reinforcing key concepts and introducing structure through learning CorasWorks navigation. Within the context of navigation and structure students learn design options to facilitate usability and application maintenance. By building a Practice Site using a CorasWorks Starter Template students experience design freedoms afforded through the CorasWorks Modular Application Development System and options for more rapid deployment and better application management. At the conclusion of day two there is a review of the available resources from CorasWorks for ongoing support and learning.

Chapter 3 – Building a Practice Site

Students begin day two building a practice site using a CorasWorks starter template. By configuring the Menu Navigation students learn how to better organize and manage information within collaborative applications or general collaboration sites using a cascading tab style menu and global menu options. As the “build out” the Practice Site students learn other key capabilities of the software in addition to the design freedoms afforded through the configuration options. Key topics in Chapter 3 include:

- Four Key Design Elements
- Saving and Importing a Site Template
- Create Practice Site/Example Site
- Defining a Display Grid Worksheet
- Menu Navigation: Structure and Context
- Standard Roll-Ups Across Departments
- Reusing a Display from another Site - Saving Configured CorasWorks Web Parts to the Gallery
- “Pointing” to a Display on Another Site
- “Supporting Content” for Usability
- Publishing Documents Using a Filter
- Publishing Documents Using the Publisher Action
- CorasWorks Timers and Triggers to automate business process

On completion of Chapter 3 Students will be able to:

- Better design collaborative applications and solutions by applying the Four Key Design Elements.
- Create displays of information residing in the same Site, information aggregated from multiple Sites, or information residing in a separate Site, Site Collections, or Web Applications.
- Create and share working examples to facilitate the requirements gathering process with end users and more rapidly build collaborative applications or solutions.
- Reduce time to productivity using CorasWorks Starter Templates.
- Interconnect collaborative applications and solutions for enhanced usability and productivity.
- Facilitate and automate common end user actions for increased productivity.
- Better support and maintain collaborative applications and solutions through the use of Wizards, Central Configuration, and Central Management options - The CorasWorks One Touch System.



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Student Self-Assessment and Student Feedback

Each student will be required to complete a short self assessment at the conclusion of each day of training. The assessment and review is designed to help students identify any knowledge gaps and reinforce core topics and concepts reviewed during training. In addition, a Student Feedback mechanism is included within the training environment to enhance communication with the instructor regarding questions or general feedback on the course. At the conclusion of the training each student will complete an electronic course evaluation.

Registration Information

Course fee: \$1,495 per student (**Note:** Customers who purchased the CorasWorks Premium Annual Support and Maintenance plan receive a 20% discount.)

Fee includes: Student kit - Comprised of an in-depth training manual, CorasWorks reference set, and job aides. **Meals** - Breakfast, lunch and snacks will be provided.

For more information on future dates and locations, please contact us at 1-866-580-3115 or via email at info@corasworks.net.



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