



CorasWorks® Workplace Suite™ Distance Learning (Public)

CORASWORKS

THE NEXT STEP IN THE EVOLUTION OF COLLABORATION

CorasWorks Workplace Distance Learning

CorasWorks distance learning training is designed to help its workplace builders fully leverage the CorasWorks Workplace Suite to build collaborative applications 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 Workplace Suite – Enterprise Edition which extends and enhances Microsoft SharePoint products and technologies to better support a spectrum of organizational needs. Students will 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 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 collaborative applications that deliver SharePoint information 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 Grid Display, Calendar Display, and Chart Display), 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 wizard driven administration interface
 - Pinpoint information by targeting specific data from multiple sites and lists, and applying filtering to that aggregate data
 - Drive business process and enable an active workplace using CorasWorks actions
 - Create custom aggregate displays of list information using an intuitive wizard
- 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 Workplace Suite and want to learn how to build, customize, and/or support collaborative business applications and workplaces using the CorasWorks Workplace Suite – Enterprise Edition.

Prerequisite

As a prerequisite for the training, all participants should have a working knowledge of Microsoft SharePoint (either WSS or MOSS) and the CorasWorks Workplace Suite.

Additional Information

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

Term: 2 Consecutive weeks

- Week 1 – Session 1, 2, and 3
- Week 2 – Session 4, 5, and 6

Course fee: \$1,495 per student

Fee includes:

- **Instructor-facilitated Microsoft LiveMeeting sessions**
- **30 day instructor e-mail support**
- **Student Kit** - Comprised of an in-depth training manual in PDF format
- **Hosted Site Collection** – CorasWorks-hosted site collection for each student available for 30 days from the start date
- **Communication Fees** - LiveMeeting and Toll Free telephone
- **Recordings** – Sessions are recorded and posted on the hosted site for playback by the students

Conditions:

- Training materials and presentations are restricted to students only, and for the sole purpose of the Workplace Suite Distance Learning. Training materials include all presentations, recordings, lesson plans, and training manuals included in the program.



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- 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 for additional details or a schedule of upcoming CorasWorks Workplace Suite Distance Learning courses.

Course Outline

The following topics will be covered in Session One:

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

On completion of the Session One, Chapter One 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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The following topics will be covered in Sessions Two and Three:

- Creating Displays for:
 - CorasWorks Grids
 - Scope – Where you can pull data from
 - Schema – Limiting and expanding the columns being displayed
 - Filtering & Grouping – Refining the display
 - CorasWorks Calendars
 - Scope – Creating more targeted data return
 - Categories – Fixed color codes
 - Resources – Dynamic color codes and end user enablement
 - Charts
 - Creating Multiple Views and Chart Types
- Defining, Editing, and Applying Actions to Displays
- Reusing Existing Actions within Multiple Displays
- Creating Actions with the Actions Wizard
- CorasWorks Panel Template
 - Using Web Part Pages to add and manage displays

On completion of Session Two, Session Three, Chapter Two, and the self-paced exercises, you 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 following topics will be covered in Sessions Four and Five:

- The CorasWorks Starter Templates
- Design Freedoms: Four Key Design Elements
- Creating a Practice Site/Example Site
- Menu Navigation: Creating a Cascading Menu Structure for Ease-of-Use and Better Management
- Aggregating Data Across Site Collections with Central Views and Global Links
- Reusing a Display: Saving Configured CorasWorks Web Parts to the Gallery
- “Wiring-Up” Displays from Multiple Sites into a Single Site or Dashboard
- Leveraging Centralized Content across Multiple Sites
- Copying and Repurposing Central Views as Local Views
- Publishing Items Using the Publisher Action

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

- Access and Sork with the CorasWorks Starter Templates
- Work with Additional Design Options and Freedoms to Address a Broader Range of Business Needs
- Configure the Menu Navigation using a CorasWorks Starter Template
- Use CorasWorks Global Links and Central Views to Increase Speed to Productivity and Achieve Better Overall Maintenance
- Better Understand the Core Capabilities and Additional Configuration and Administration Options to Build Faster, Manage Easier, and Accomplish More

The following topics will be covered in the Sessions Five and Six:

- Expanding the Scope to include Additional Levels or Sub-Sites
- Beginning the Tree Navigation from the Top of the Site Collection
- Adding Global Navigation Using a Central View
- Adding the Action Launcher to the “Top Level” Navigation Area



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On completion of Session 5, Session 6, Chapter Four, and the self-paced exercises, you will be able to:

- Customize the CorasWorks Tree Navigation to show sites up and down the site hierarchy and site structures from other site collections
- Create and Maintain a Global Navigation Option for End Users to Easily Navigate Across Sites, Site Collections, Web Applications, Virtual Servers, or even to Pages Outside of SharePoint
- Provide Access to Actions that Don't Require Existing Data, such as Creating New Items or Documents or Directing Users to URLs

The following topics will be covered in Session 6:

- Escalating Items to Other Roles or Users using Actions, and Filtered Data Displays
- Chaining Actions to Drive and Streamline Business Process.
- Incorporating Targeted Email Notification to Facilitate the Process

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

- More Easily Drive and Manage Routine Business Processes across Sites, Site Collections, Virtual Servers, and Web Applications
- Apply Filters, Grouping, Multiple Views, Icons, Actions, and other Data Display Configurations to Improve the way Users Work with and Manage Data
- Create Distributed Applications by Providing Functionality to Users Where they Work Versus Having to Navigate to a Site or Application

Supplemental lab exercises are provided to leverage the learning from previous lessons in the course. They are intended to reinforce key CorasWorks concepts and features while at the same time providing exposure to additional capabilities and design freedoms. Some assumptions are made based on the student's understanding of the SharePoint foundation features and their acquired knowledge from the CorasWorks training.