# Cordys User Interface

Exercises

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# 1. Module

## 1.1 Objectives

After completing this course module, you will be able to:

- Launch the Cordys Explorer
- Navigate through the Cordys Explorer
- Customize the look and feel
- Launch applications in the Cordys Explorer

## 1.2 Overview

The Cordys Explorer is the single user interface for all types of users in Cordys, whether they are administrators, developers and/or end-users. Working your way through this module, you will acquaint yourself with this user interface. It is the first step in getting introduced into the Cordys Business Operations Platform.

# 2. About the Cordys User Interface

## 2.1  Introduction

When you launch Cordys in your web browser, typically a dialog box will display prompting you to enter your user name and password. On successful authentication, the Cordys Explorer opens and displays the Cordys User Start Page (CUSP). Your user name and your current (default) organization are displayed at the top of my applications.

By default, CUSP displays a Shortcut bar, a Task bar, and one or more Application Palettes that contain the associated applications and documents. Cordys uses the concept of roles to determine the level of access to Cordys and its applications. While the Shortcut bar and Task bar are common across all roles, the content of the Application Palettes is role-specific and depends on the permissions granted to a role. The applications and documents available in the CUSP and the Application Palettes are referred to as *Artifacts*.
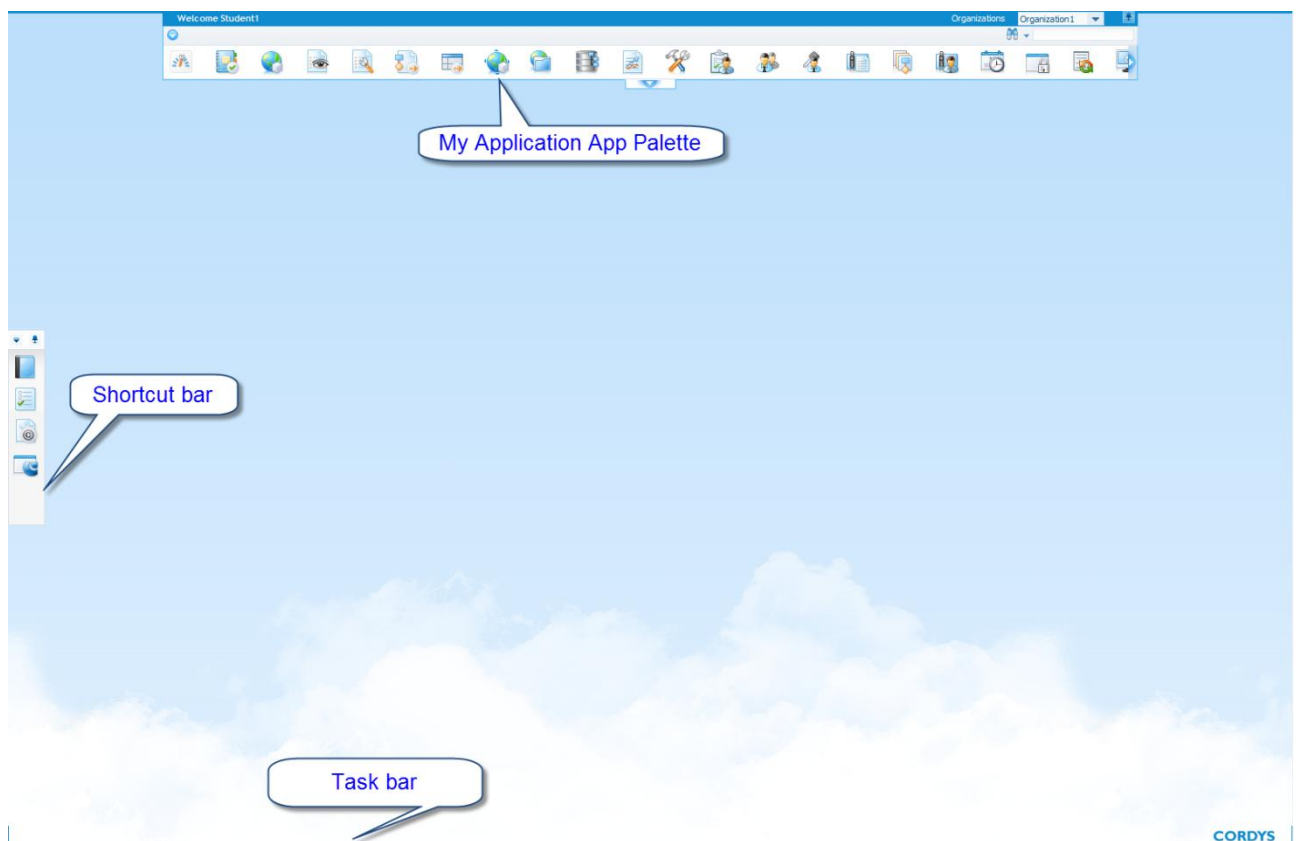


Note that the content of the My Application App Palette depends on the roles that are assigned to you.

## 2.2  References

More information about this subject is available:

- Online Cordys Documentation:
  Cordys Business Operations Platform → Getting Started with Cordys Explorer
- http://community.cordys.com

# 3. Exercises

## 3.1  Prerequisites

**You must have completed the following modules:**

- Cordys Introduction
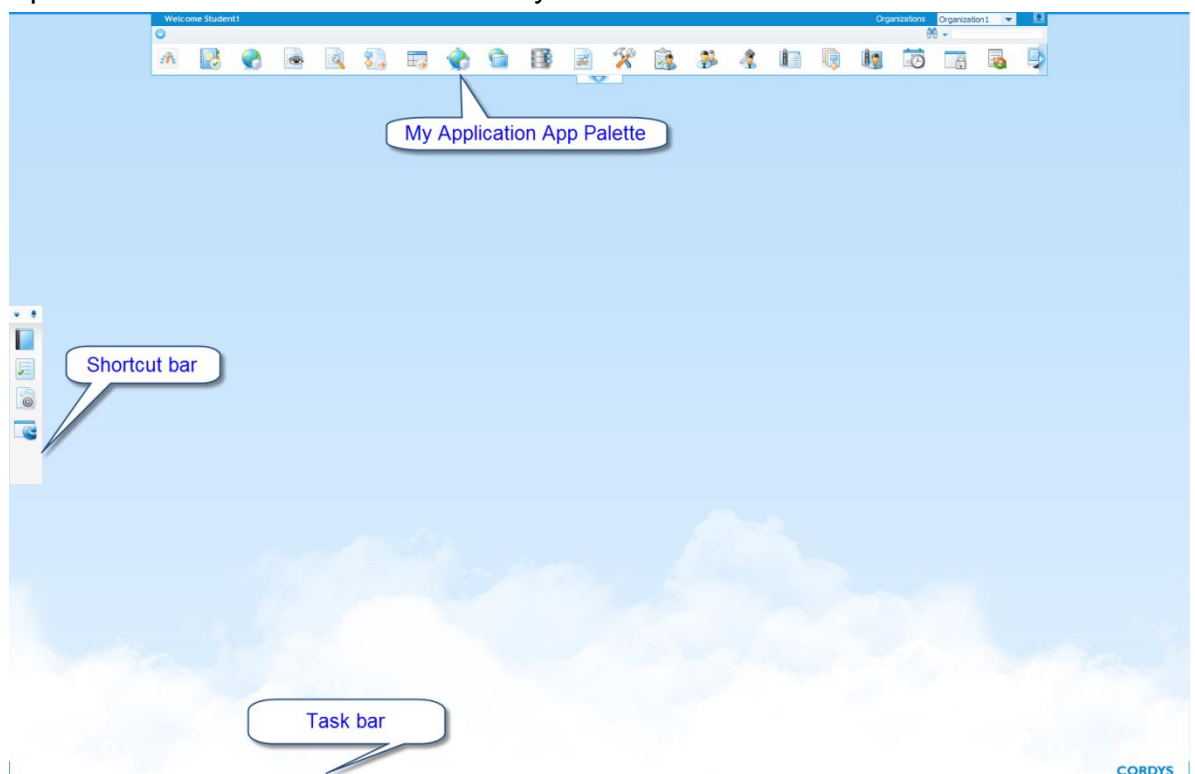
**You must have the following roles assigned:**

- Administrator (done by default on your training environment)

## 3.2  Using App Palettes

In this exercise, you will explore the behavior of the different palettes.
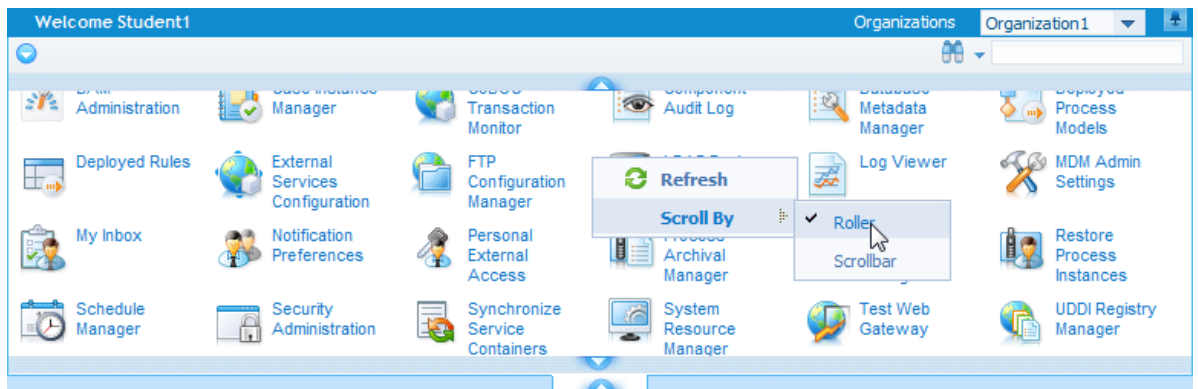
**My Applications**

1.  Open an internet browser to the Cordys Server:



2.  Click the handle below *My Applications* to open the curtain.

**3.** Right click in *My Applications*.
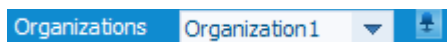


**4.** Check the available options in the context menu.

**5.** Click on the *User Manager* artifact  to launch it.

The *User Manager* application is started and the *My Applications* curtain is closed. The *User Manager* is added to your recently used bar.

**6.** Maximize the *User Manager* application.

**7.** Click the pin **Hide my applications** to hide the recently used bar.



**8.** *Restore* the *User Manager* application.

**9.** Click the pin **Show my applications** to show your recently used bar again. You will notice that *User Manager* application has been added here.

You can use the full screen mode (F11) of your internet browser to allow more screen space to the Cordys Explorer.

**10.** Type in **system** in the search box that says *Type to launch application* to start the *System Resource Manager*.
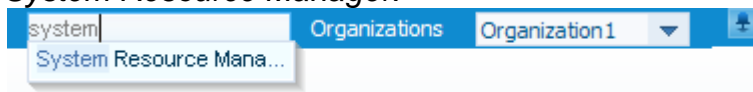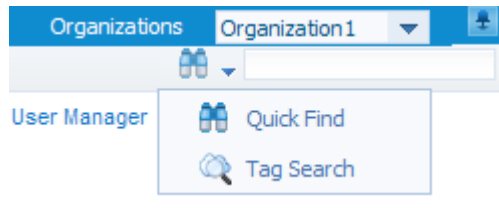


**11.** Right click in the task bar at the bottom.

**12.** Select *Minimize All Applications*.
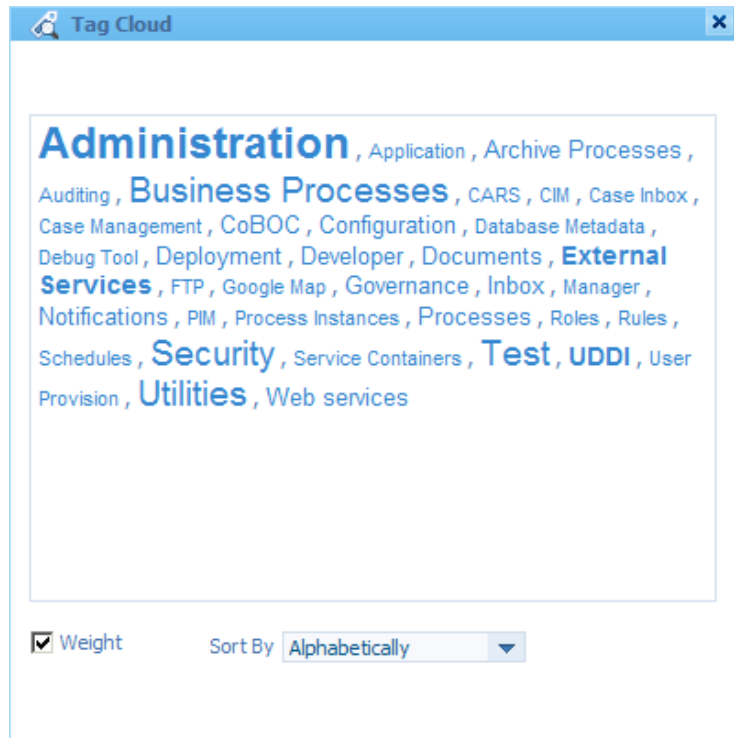


**13.** Right click again in the Taskbar to *Show Open Applications*.

**14.** Close the open applications.
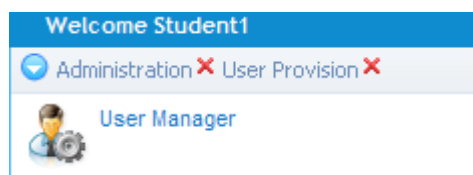
**Making use of tags**

1.  Open *My Applications App Palette*.

2.  Click the dropdown next to the *Quick Find* icon ( ) in the right upper corner and select *Tag Search*.

3.  Click the *Show Tags* icon ( ) to the right of the search box.

4.  Click the **Administration** tag to filter the administration tasks.

5.  Next click **User Provision**.

6.  Close the *Tag Cloud* window.

Above the artifacts is a line showing all the tags you have selected. You can click the red cross to remove a tag or click one of the tags to view the artifacts that are associated with the given tag.

7.  Start the *User Manager*.

8.  Enter a **T** in the search box and click the **Search** button:

*Which users do you see?*

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**9.** Close the *User Manager*.

**10.** Remove the *Administration* and *User Provision* tag-crumb view.

> **NOTE**
> When you open the User Manager, you will only see your own user listed. This is to prevent fetching ALL users, which might take a long time. To get a list of all the users in your organization, click the Show All button next to the Search button.

## 3.3 Using the Shortcut Bar

In this part of the exercise, you will explore the *Shortcut bar*.

**Shortcut bar**

**1.** Use the **pin** in the Shortcut bar to *Float* the Shortcut bar.
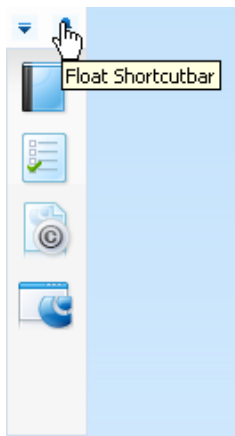


**2.** Test the floating option by moving your mouse in and out the shortcut bar area.

**3.** Set the *Shortcut bar* to either fix or float to suit your favorite use.

**4.** View the installation details of Cordys by clicking the *Copyright and Installation details* artifact icon.

*Which version and build of Cordys is installed?*

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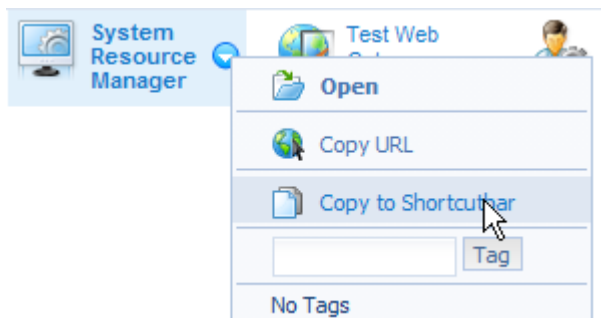
**NOTE**

This screen is also known as "About Cordys" and, for example, Cordys Support may ask you to send the xml of this page, to collect all relevant details of your Cordys installation.

**5.** Open the *Cordys online Documentation* and find information on the CUSP.

*What are the keyboard shortcuts to tab through the open applications in CUSP?*

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**Adding shortcuts**

**1.** Open *My Applications.*

**2.** Place your mouse over the *System Resource Manager* icon.

**3.** Click the **blue button**.

4. Select *Copy to Shortcutbar*.



5. Test if your shortcut works by selecting it from the Shortcut bar.

> **NOTE**
> Alternatively, you can also use drag and drop to add artifacts in the Shortcut bar.

**Create personal shortcuts**

1. In the *Shortcut bar*, click the **Options** icon ▼ and select *Create Shortcut*.

2.      Provide the following details:

| Field | Value |
|---|---|
| URL | http://www.cordys.com |
| Tooltip | Cordys home page |
| ID | CordysHomePage |
| Caption | Cordys Home Page |
| Icon URL | /cordys/Academy/home.png |
| | Note that the *Icon URL* is case sensitive |



3.      Click **Create**.
4.      Test if your shortcut by selecting it from the shortcut bar.

## 3.4  CUSP Preferences

In this part of the exercise, you will examine the CUSP preferences.

**Startup applications**

1.      Click the *Preferences* artifact  on the Shortcut bar.
2.      Go to the *Startup Applications* tab.

3. Drag and drop the *My Inbox* artifact from *My Applications* into the startup applications area:
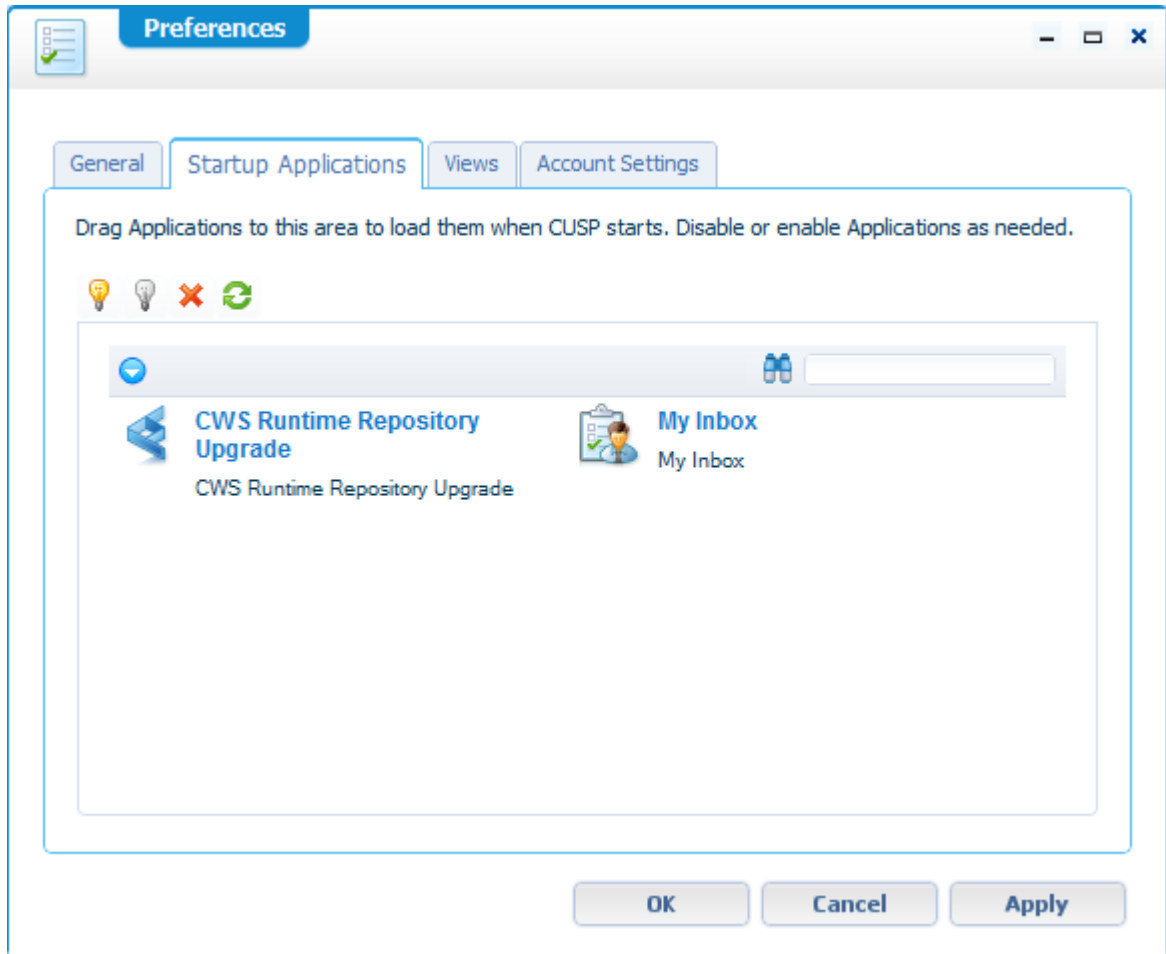


4. Click **OK**.
5. Refresh your internet browser.
   Notice that your Inbox is started automatically when you connect to Cordys.
6. Close the *My Inbox* application.

**Tagging and personal views**

1. Open *My Applications*.
2. Point your mouse at the *My Inbox* artifact and click the blue button.
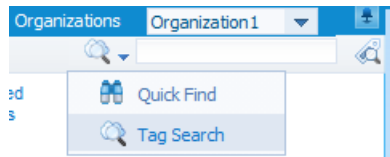3. Enter the value **My Selection** and click the **Tag** button.
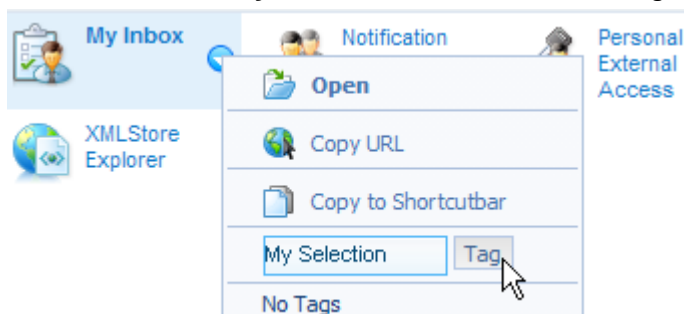


4. Apply the same tag to the *System Resource Manager* artifact. When you start typing the tag, a selection list appears where you can select from.
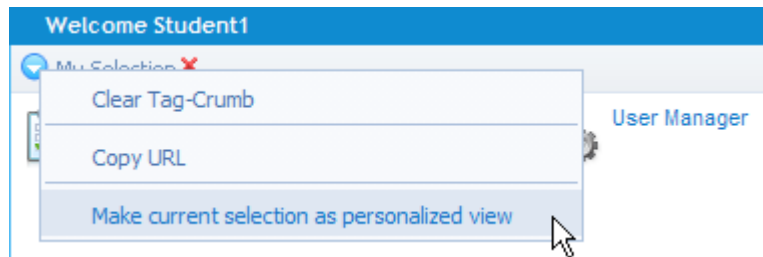5. Include the *User Manager* artifact in the *My Selection* tag as well.

> **NOTE**
> You can add more tags to the same artifact.

**6.** Click the **Tag Search** icon of *My Applications*.



**7.** Click on **Show Tags** on the right.

**8.** Click *My Selection* from the tag cloud and close the Tag Cloud.

**9.** Click the blue button 🔵 in front of the *My Selection* tag.



**10.** Select *Make current selection as personalized view*.

**11.** Enter the name **My Selection** and click **OK**.

**12.** Delete the *My Selection* tag of the *My Application* (That is the lower part):
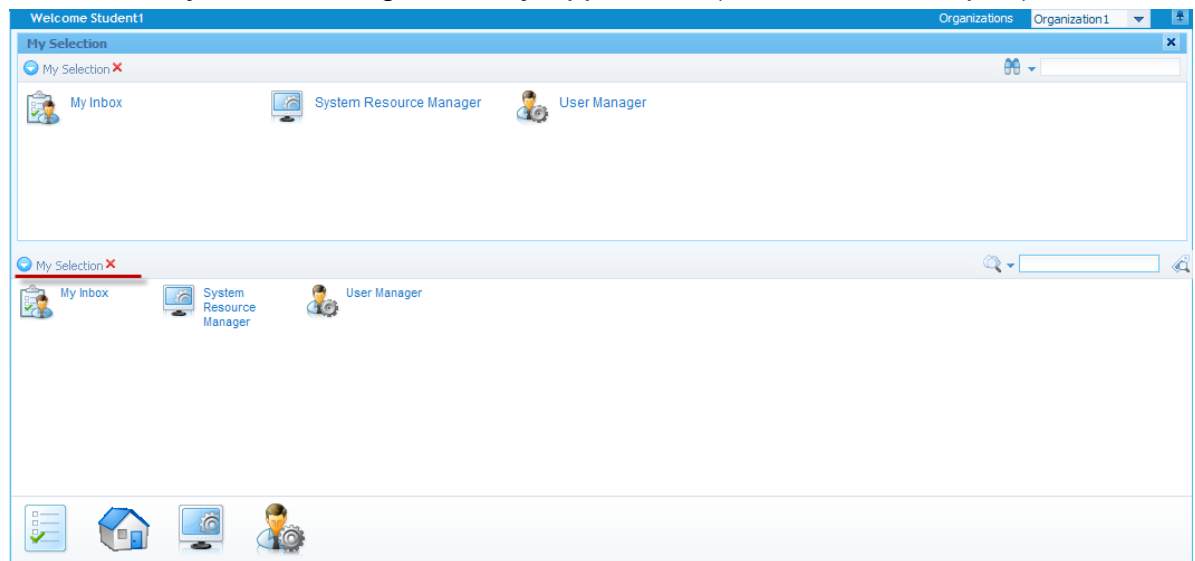


You will now see both *My Applications* and your personalized view(s).

**13.** Refresh your internet browser.

**14.** Open *My Applications*, this will show your created view now as well.

**15.** Open the *CUSP Preferences*, via the *Shortcut bar*.

**16.** Go to the *Views* tab.

**17.** Click on *My Selection*, to select it and click **Disable** in the toolbar:
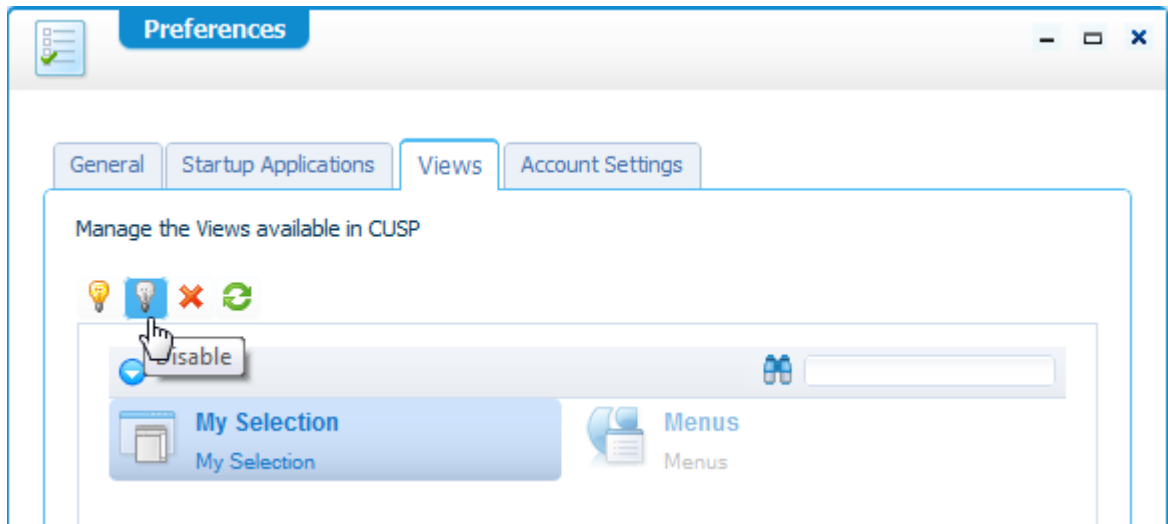


**18.** Click **OK**.

**19.** Refresh your browser to test.
You will notice that the *My Selection* view is not displayed. The view is still listed in the *Views* page of your CUSP Preferences but has been grayed out to indicate it is disabled.

## 3.5 Using a Cordys Application Externally

In this part of the exercise, you will discover how you can launch a Cordys application from a (non-Cordys) portal.

**1.** Point your mouse at the *System Resource Manager* artifact.

**2.** Click the blue button and select *Copy URL*.

**3.** Copy the complete URL from the displayed *Cordys Clipboard* window.
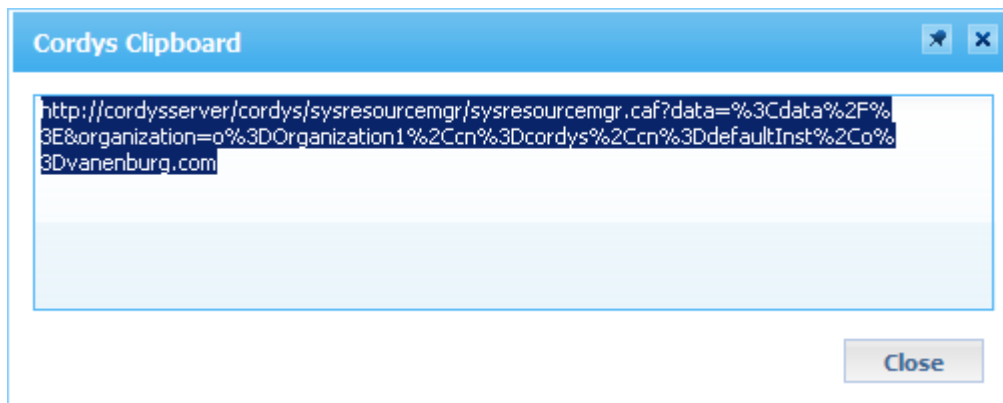


**4.** Click **Close**.

**5.** Open a new internet browser.

**6.** Paste the URL in the address bar.

**7.** Provide the relevant login when requested.

The *System Recourse Manager* is now started as a standalone application.



## 3.6 Questions

1) What is an application palette?

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2) What is an artifact?

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# 4. Learning Report

**Achievements**

- ❑ I can access Cordys through the Cordys Explorer
- ❑ I know the concepts of the CUSP, the application palette, and Cordys artifacts
- ❑ I can start applications and tasks
- ❑ I can get detailed information about the Cordys installation
- ❑ I am able to access and use the Cordys online documentation

**Notes**