Glimpse List Manual

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Table of Contents

1 What Is Glimpse List?

Glimpse List is a silverlight application that can be hosted on a SharePoint site to provide a quick "glimpse" of SharePoint lists. Icons and custom calculations make Glimpse List capable of translating the data in a SharePoint list into information relevant to the user in a quick and efficient way. This manual demonstrates installation and usage of Glimpse List (note that the examples are for demonstration purposes only and user lists and icons are specific to the installation).

2 Navigation
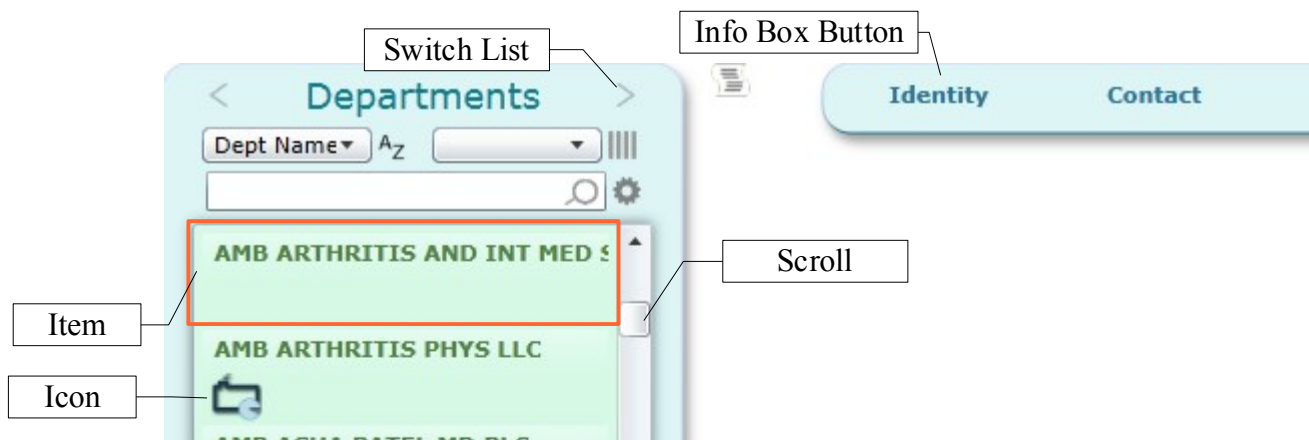
Clicking an item will automatically open the first info box for that item as shown below:
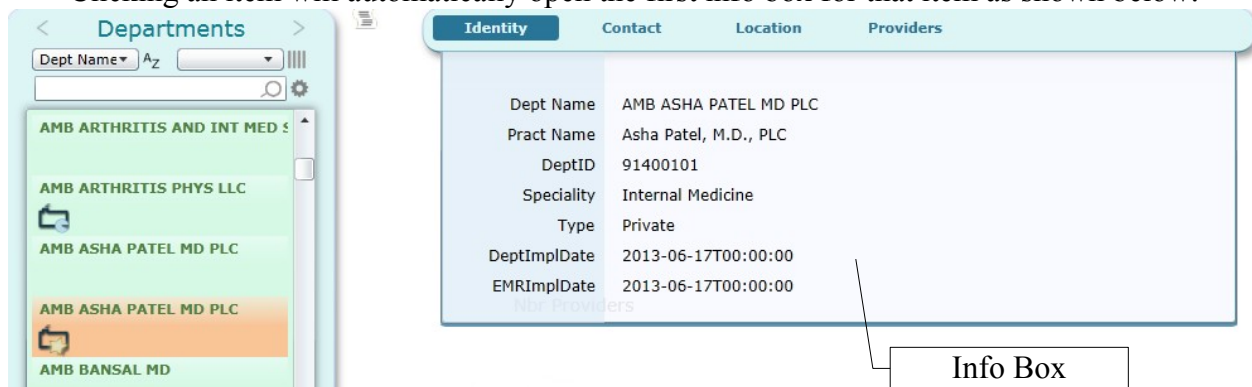
When an item is clicked, it is highlighted. To view other information on the item you can click on another info box, for example Location.

3   Searching

3. Enter search term

2. Search parameter
selection box opens

1. Open Search
Settings

4. Click search
button or press Enter
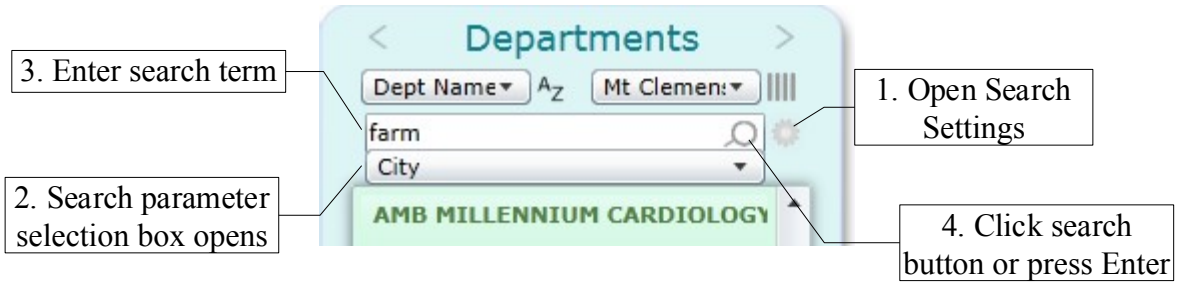
Alternatively, you can search without opening settings and the default search parameter will be used (the default is the one already selected when settings are opened).

Search parameter
selection list

4 Sorting

Sort parameter selection list

Sort Mode (Ascending or Descending)

- DeptID
- Dept Name
- Pract Name
- PrimaryLoc
- DeptImplDate
- EMRImplDate
- Zip Code
- Manager
- NbrProviders
- NbrAttending
- DeptID %

5 Filters

1. Turn Filter On

2. Open Filter Category List

3. Select Category

4. Open Filter Value Selection List
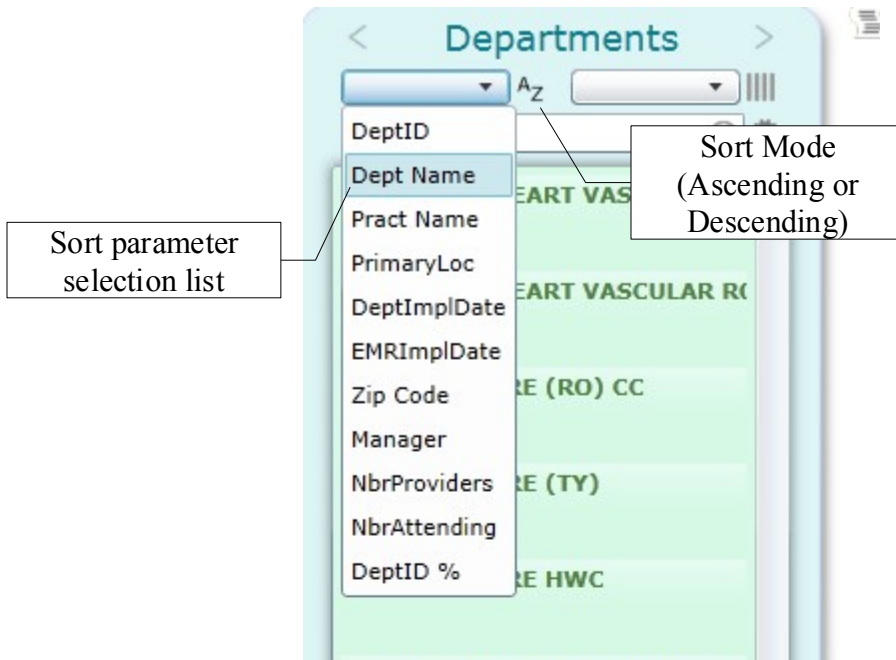
5. Select Value

- Speciality
- Type
- City
- State
- Certain Depts
- Is Family Specia
- Within 6 Months
- 3 Years Ago

- Allen Park
- Bad Axe
- Berkley
- Beverly Hills
- Bingham Farms
- Birmingham
- Bloomfield Hills

ACADEMIC HEART VA

ACADEMIC HEART VA

ACUPUNCTURE (RO)

ACUPUNCTURE (TY)

ACUPUNCTURE HWC

BEVERLY HILLS I

HOUGH FAM CTR

5

6 Graphs

Graph Title

Slice Range

Items Per Slice

Selected Slice

Orders CBT %
62.5-75 % (128)
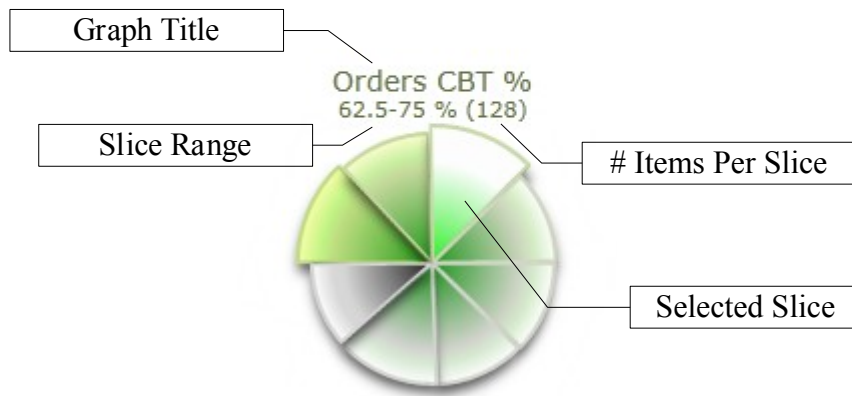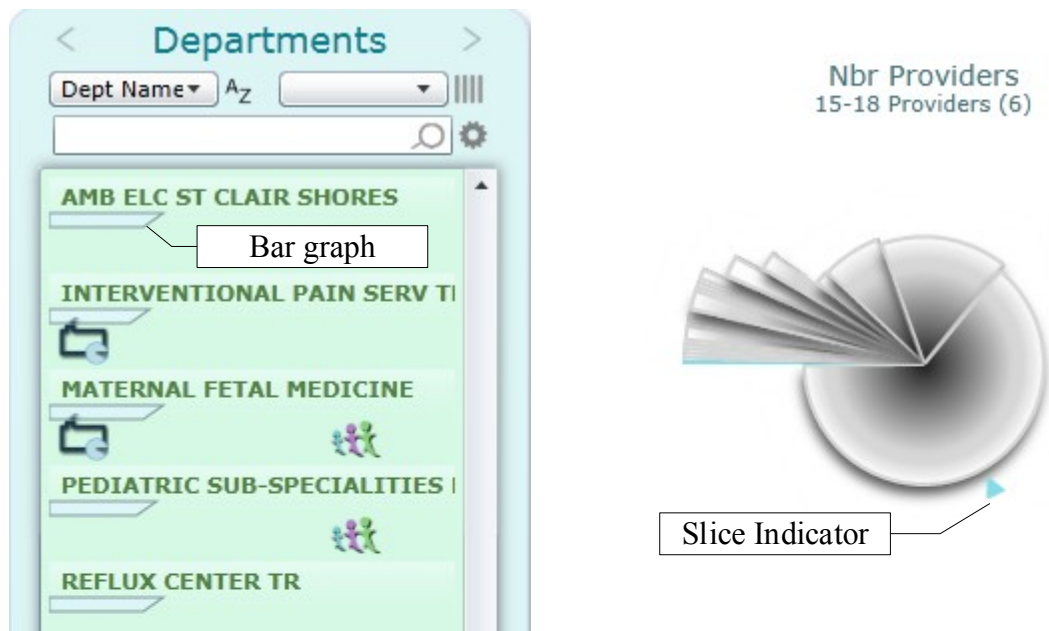
Graphs convey the relative values and frequency of certain traits. Above is a Glimpse Chart displaying information from almost evenly distributed data (from a random function generator). As you can see the "pie" slices are nearly the same in size, meaning that there are about the same number of items falling into each range of values. One slice is selected so its color is highlighted.

When a slice is selected, the list shows only items in the range of the selected slice(s). Bar graphs are drawn from the values on the chart.

Departments

Dept Name ▾ A_Z

AMB ELC ST CLAIR SHORES

Bar graph

INTERVENTIONAL PAIN SERV TI

MATERNAL FETAL MEDICINE

PEDIATRIC SUB-SPECIALITIES I

REFLUX CENTER TR

Nbr Providers
15-18 Providers (6)

Slice Indicator

The slice indicator shows the corresponding slice the selected item belongs to. This way values on the graph can be read for each item without drawing the bar charts.

Clicking the graph title selects all slices for you, and different slices can be selected/deselected by clicking them.

Below is an example of using slice selections to get the "intersection" of slices (only items that match the range of selected slices in each graph).
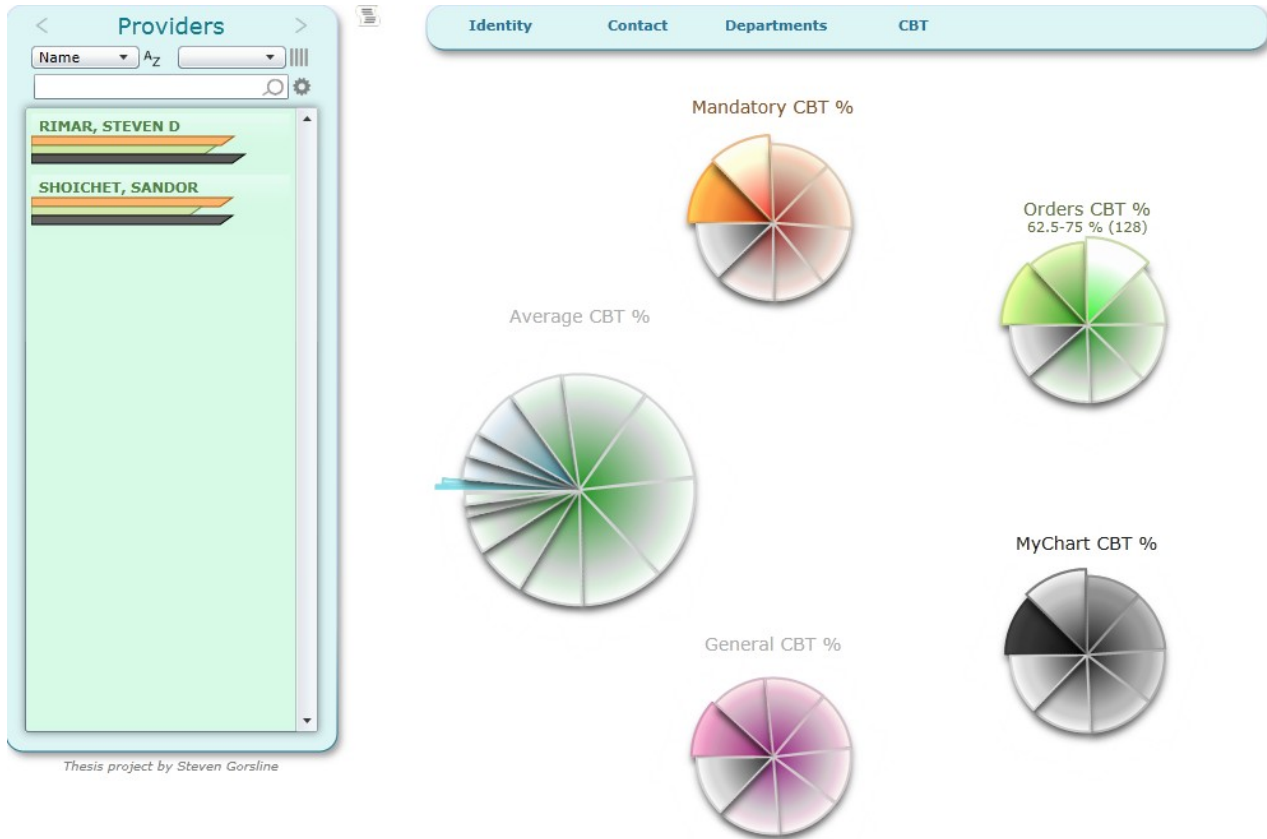
7 Installation

To install Glimpse List, simply place GlimpseList.xap and config.xml in a directory on the server. Then add a Silverlight web part to the page and configure it to use GlimpseList.xap by placing the full URL in the application source field.

8 Customization

Once installed, Glimpse List needs to be configured to read the list data and present it as desired. A configuration file has the following elements inside a <Layout> object.

8.1 Settings for SharePoint REST (oData) Web Service Queries

1) Size
items per query, decrease to reduce server load

2) Interval
Request wait period (milliseconds), increase to reduce server load

3) ListsUri
Main SharePoint location, to retrieve list information from

Example:
<QuerySettings>
  <Request
    Size='25'
    Interval='250'
    ListsUri='https://sp.beaumont.edu/it/ITAmbulatoryImpl' />
</QuerySettings>

8.2 List Definitions

List is a SharePoint list loaded through the REST interface

1) Name
Name of list in SharePoint – REQUIRED

2) Default
"true" if list will be first shown upon loading Glimpse List – REQUIRED(only one list)

3) Caption
Attribute items are named in list, default is SharePoint Id – OPTIONAL

4) SortDefault
What list will sort by when loaded – OPTIONAL

5) SortDesc
"true" if list should be sorted high to low when loaded – OPTIONAL

6) SearchDefault
Default search attribute – OPTIONAL

7) RefreshHours
Interval in hours before list refreshes, updates are disabled and whole
list refreshes at once – OPTIONAL

8) DisplayName
What list will be displayed as - OPTIONAL

Example:
<List Name='Provider List' DisplayName='Providers' SortDefault='Physician_x0020_Name'
Caption='Physician_x0020_Name' >

8.3 Attribute Definitions

An attribute is a SharePoint column, reverse link, or calculated link (LinkOn).

1) Name
Internal name of column in SharePoint (Get by F12 Dev Tools select element on column name
in SharePoint) - REQUIRED

2) DisplayName
What attribute will be displayed as – OPTIONAL

3) Type
"Text", "Number", "Date" type attribute is treated as - OPTIONAL (default "Text")

4) Sortable
"true" if attribute can be sorted by – OPTIONAL

5) Filterable
"true" if attribute can be filtered by – OPTIONAL

6) Searchable
"true" if attribute can be searched by – OPTIONAL

7) LinkSource
List links to - OPTIONAL (required for links)

8) LinkAttribute
Attribute to display from linked list - OPTIONAL (required for links)

9) MultiItem
"true" if attribute is from a SharePoint lookup column with multiple items - OPTIONAL (required for multi item links)

10) LinkAttributeSource
Attribute in source list reverse link is from - OPTIONAL (required for reverse links)

11) ReverseLink
"true" if attribute is a reverse link - OPTIONAL (required for reverse links)

12) LinkOn
Attribute to join lists by when calculating a link - OPTIONAL (required for calculated links)

Example:
<Attribute Name='Physician_x0020_Name' DisplayName='Name' Sortable='true' Searchable='true' />

8.4 Condition Definitions

Conditions are used to calculate a value which drive icons and can be displayed in a field or graph. Number and boolean calculations can be done interchangeably with boolean evaluating to 0 or 1.

1) Name
Name for the condition, must be unique per list – REQUIRED

2) DisplayName
The name condition is displayed as – OPTIONAL

3) Sortable
"true" if condition can be sorted – OPTIONAL

4) Searchable
"true" if condition can be searched – OPTIONAL

5) Filterable
"true" if condition can be filtered – OPTIONAL

6) Formula
Formula to calculate value from, using Glimpse formula syntax - REQUIRED

Example:
<Condition Name='Has Email' DisplayName='Email?' Filterable='true' Formula='[Physician_x0020_Email] CONTAINS {@}' />

8.5 Glimpse Formula Syntax

Formulas follow traditional math notation using addition(+), subtraction(-), multiplication(*), and division(/). Parenthesis groups orders of operation as expected.

Additionally, logical operations can be grouped with AND OR, and IF combined with comparisons gives functionality similar to IF statements as can be seen in the usage examples below.

1) Operators
+: Addition, ex. 1 + 2 = 3
-: Subtraction, ex. 1 - 2 = -1
*: Multiplication, ex. 1 * 2 = 2
/: Division, ex. 1 / 2 = 0.5
IF: Same as * but used as IF, ex. 1 + (2 IF ([X] LT 4))

> In this example the contents in parenthesis becomes 0 if the statement following IF is false and 2 if the statement following IF is true. However, putting * (multiplying) would be equivalent since comparisons evaluate to 0 or 1. Thus IF is only meant for readability and does nothing functionally different than multiplication.

2) Logical
AND: And, ex. [X] = 2 AND [Name] CONTAINS {Bob}
OR: Or, ex. [X] + 3 = 5 OR [X] != 1
=: Equals, ex. [X] = 1
!=: Not equals, ex. 2 != 1
GT: Greater than, ex. 3 GT 2
LT: Less than, ex. 2 LT 3
GTE: Greater than or equal, ex. 3 GTE 3 AND 3 GTE 2
LTE: Less than or equal, ex. 3 LTE 3 AND 2 LTE 3
CONTAINS: Text contains text ignoring case, ex. {Red Light King} CONTAINS {red}

3) Brackets
(): Groups order, ex. [X] GT [Y] OR ([X] = 2 AND [Y] GT 3)
[]: Reference attributes or other conditions, ex. [Name] = {bob}
{}: Text, ex. {Blue} != {Green}

4) Modifiers
Used on links with syntax [Attribute.Modifier], modifiers work on either an attribute or condition from the linked list.

> #### a) Links
> Links can be followed using [Link.LinkAttribute] and link chains of any length can be followed, ex. [Link1.Link2.Link3.Link3Attribute]

b) COUNT
Number of linked items, ex. [Grades.COUNT]

c) TOTAL
Sum of all linked items, ex. [Grades.TOTAL]

d) AVERAGE
Average of all linked items, ex. [Grades.AVERAGE]

e) MEDIAN
Median of all linked items, ex. [Grades.MEDIAN]

f) MIN
Minimum of all linked items, ex. [Grades.MIN]

g) MAX
Maximum of all linked items, ex. [Grades.MAX]

8.6 Glimpse InfoBox Definitions

InfoBoxes are used to show detailed information about an item in the list. Both attributes
and conditions can be shown. An InfoBox has any number of fields and each field has either an
attribute or condition that it will display. Fields are shown in the order they are declared
with the DisplayName defined for the attribute or condition.

InfoBox:

1) Name
Name of the InfoBox - REQUIRED

2) ButtonName
Text displayed on button for InfoBox - REQUIRED

3) Height
Vertical size of the InfoBox in pixels (default=190) - OPTIONAL
Changing the size to best fit its contents will optimize screen space and make it look nicer.

Fields:

1) Content
Source of data to be displayed, either an attribute or condition – REQUIRED

2) Type
"Number" if condition should be displayed as number, otherwise "yes" or "no" is displayed -

OPTIONAL

Example:
<InfoBox Name='ProviderIdentity' ButtonName='Identity' Height='170' >

       <Field Content='Physician_x0020_Name' />
       <Field Content='Provider_x0020_Title' />
       <Field Content='Physician_x0020_Speciality' />
       <Field Content='DRID' />
       <Field Content='NPI' />
       <Field Content='DEA' />
</InfoBox>

8.7 Glimpse Icon Definitions

A Glimpse icon is an image on a list item that indicates the state of the item. For example, a soccer ball could be displayed for students that are on the soccer team in a class list. Hovering over an icon will display hint text of what that icon indicates.

1) Type
"Image" for image icons – REQUIRED

2) InfoPrefix
Text to show when hovering over icon – REQUIRED

3) URI
Location of the image – REQUIRED

4) URIType
"Relative" or "Absolute", default="Relative" – OPTIONAL

5) Position
Location of the icon on item bar (0 - 175) – REQUIRED

6) ShowOnCondition
Condition that icon will show – REQUIRED

7) OnCondition
"false" if icon shows when condition is false - OPTIONAL

Example:
<Icon Type='Image' InfoPrefix='No Beaumont Email' URI='Images/no_bhs_email.png' Position='4' ShowOnCondition='Beaumont Email' OnCondition='false' />

13

8.8 Glimpse Chart Definitions

Glimpse charts display the ratio of items that fit into a certain category in a "pie chart" style. Slices of the Glimpse chart can be hovered over to show range of values and number of items in the slice.

Slices of the Glimpse chart can be clicked on to display a list of items in the slice with a bar graph of the values generating the Glimpse chart.

1) Name
Name of Glimpse chart – REQUIRED

2) Source
Attribute or condition to graph – REQUIRED

3) Scale
0 to X where X is the highest value, default=100 – OPTIONAL

4) Size
Displayed size of graph, default=120 – OPTIONAL

5) Suffix
Units of the values graphed, ex. 12 pts where "pts" is the suffix - OPTIONAL

6) Subdivisions
Number of slices, default=8 – OPTIONAL

7) Rotation
Angle in degrees graph is oriented, default=180 - OPTIONAL

Example:
<Chart Name='# Lead Departments' Source='# Lead Depts' Scale='10' Suffix='Departments' Subdivisions='20' />