

# Training Approval for SharePoint 2007 Solution End User Guide

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## Solution Description

The Training Approval solution is used for employees to sign up for training, or request to attend external training or conferences. It provides secure approval, tracking of training taken, and a shared calendar of approved training. It can be integrated with the Training Central solution.

**Solution Category:** Business Processes

**Primary Design Pattern:** Matrix

**For a diagram of a common scenario for this solution, please see the last page of this document.**

## When to Use This Solution

Use this solution for any or all of the following scenarios. If one does not match your organization's needs, you can easily configure the solution to behave differently, or change the security settings.

- When a team, department, or organization needs a process for requesting training or attendance of conferences
- For a group to share with each other the dates and times when individuals will be out of the office in training
- When a secure method of tracking training is needed for HR purposes

## How to Use the Training Approval Solution

### Training Administrator

Your organization will need one or more people to act as Training Process Administrators. This person does not need to be technical, but rather should have responsibility for maintaining the list of training approvers, and serve as a focal point for the Training Approval site. It should be the same person who would answer questions about training if you had a manual process instead of a software system in place.

The Training Process Administrator should access the system first and go to the Train Admin tab. Follow the instructions there to set up the list of Time Approvers.

### Enter a Training Request

From the main tab, a user has two choices. The upper right portion of the screen offers an external training sign up option, and the middle of the screen offers internal training sign up. Follow the on-screen instructions.

If a person has requested or has been approved for any training, it will appear under the My Training heading. For training that has been requested but not approved, there is an option from the drop-down under my training called Email Time Approver. Check the box next to

the training you wish to have approved, select **Email time approver**, and click **Go**. An automated e-mail will be sent to the time approver, asking him or her to review the item.

<b>IMPORTANT</b>	When you request training, the Time Approver is not automatically notified. Therefore you should always follow up on a request by running the <b>E-Mail Time Approver</b> action.
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### **Training Evaluations**

The section at the bottom of the page is called **My Evaluations Pending**. If your organization uses the Training Central solution, this pulls any training evaluations that are not marked **Complete** and are assigned to the current user from the Training Central site. Click the item to complete the evaluation.

### **Approving Training**

From the **Approve** tab, you can see all training requests that have not been approved, grouped by Time Approver. Several actions are available from the drop-down selection. If you are a Time Approver, you can check the box next to the item(s) you wish to act on, and then select the **Approve** option or the **Reject** option from the drop-down. When an item is approved, it is placed on the Shared Calendar and removed from the Request list. When an item is rejected, an e-mail is automatically sent to the requestor.

There is also an action to **Place On Hold** and **Add Note**. This leaves the item in the request list and changes the Stage to **On Hold**. The note is placed in the Comments field and the item will remain **Awaiting Approval** so you can come back to it later.

### **Remind Approver(s) For Many Items At Once**

If there are training requests that have not been approved, someone such as the Training Administrator can use the **Approve** screen to check many items at once and then run the **EMail Time Approver** action. This is a quick and easy way to remind all Time Approvers that items are waiting for them.

### **Calendar**

All approved items can be viewed from the **Calendar** tab. Note that each item shows the name of the person, followed by a hyphen and the title that describes what the person is doing on the specified day. Also note the color coding, which helps easily identify the type of time. This calendar can be integrated with the Vacation Approval solution.

### **External, Conferences Tab**

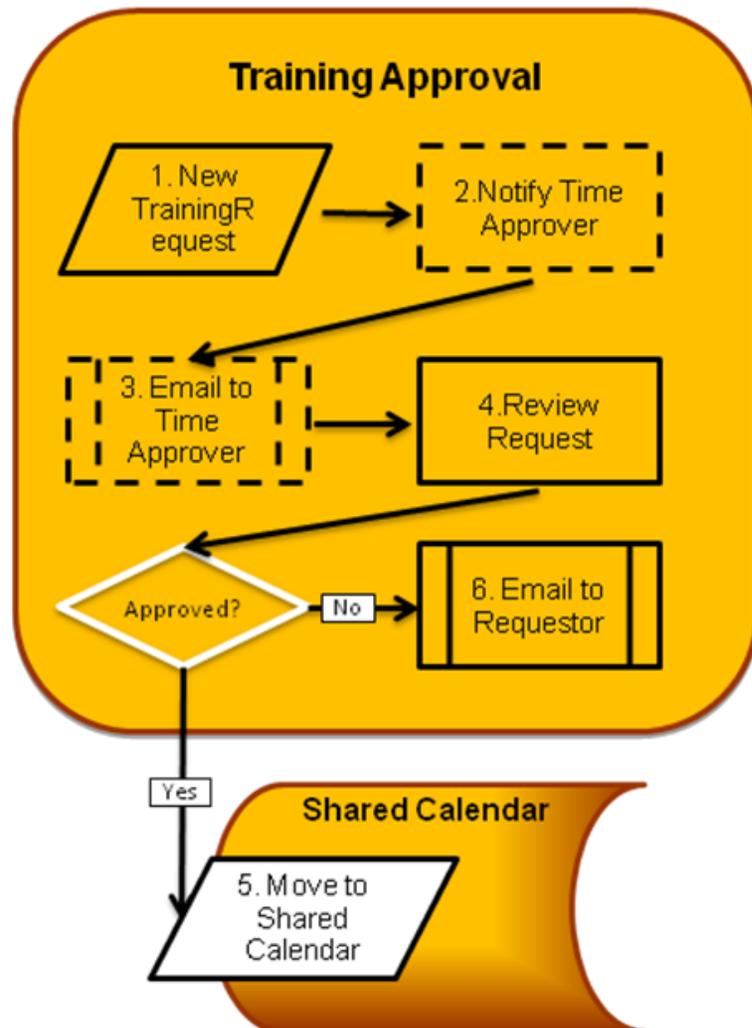
The External, Conferences tab shows past, present, and future attendance at external training or conferences sorted chronologically, with the newest first. Other columns, such as **Class Title and Name** are available for sorting by clicking the headings, and the Search box makes it easy to find a particular item.

This view is provided to facilitate knowledge sharing among employees. People can be aware when another person in the organization is considering attending the same training as them. If the training has passed, people can find out if someone else attended and ask the attendee for more information.

### **External Summaries and Notes**

Under the External, Conferences tab is the External Summaries And Notes page, which displays a document library where people can place notes regarding training. This library is provided to facilitate the sharing of knowledge. If you have notes to add, use the link at the bottom labeled **Add new document** and fill in all the document properties. The **Class Title** column references the shared calendar to provide a selection of class titles. Select the one you attended.

## Training Approval Process Diagram



### Internal Training Request Process (How)

1. **Person views available classes, selects one, and requests sign up.**  
(CorasWorks Active Display shows class list from Training Central. Check box next to class and run Sign Up action.)
2. **If desired, run option to send automated email to Time Approver.**  
(CorasWorks Active Display shows current user's requests. Check box next to request and run Email Time Approver action.)
3. **\* Email is automatically sent to Time Approver**
4. **Time Approver reviews request.**  
(CorasWorks Email Item Link action)
5. **If Approved: \* Approved Training is copied to Shared Calendar and deleted from Request list.**  
(CorasWorks chained action: Publisher and Delete actions)
6. **If Not Approved: Time Approver Rejects or puts On Hold. \* An automatic email is sent to the requestor.**  
(CorasWorks chained action: Modify List Item allows entry of comments with item, Email Item Link action sends message.)

### System also provides:

- Reports of training taken
- Calendar that can integrate with Vacation Approval

\* = Automatic