

Training Approval Solution Setup

Design Planning

The Training Approval solution should be used in conjunction with the Training Central site. This is because the Training Approval class selections for internal training are configured to come from Training Central. If your organization does not offer the internal training, Training Approval is still an effective solution for requests to attend and track external training and conferences. Usually, an organization will want to set up multiple Training Approval sites, one for each department or large group. This allows each site to have its own list of approvers and its own shared calendar.

Setup

A basic knowledge of how to administer SharePoint and how to set up CorasWorks web parts will be helpful in making the changes specified below. If more instruction is needed, refer to the CorasWorks Capabilities Guide.

Task	Description
Create Site	Create the site from the CorasWSC.TrainingApproval.v8.0.1 template.
Configure Chained Actions	<p>Go to the Tech Admin Actions Wizard tab.</p> <p>If using Central Configuration:</p> <ul style="list-style-type: none">• Click Maintain Global Links• Add a Global Link with the Name [TrainAppr]. For the URL, use the URL of the current site.• Click Submit <p>If NOT using Central Configuration:</p> <ul style="list-style-type: none">• Edit the action named Reject and notify requestor. In the Configure Action Definition section, set Action 1 to Reject request. Set Action 2 to Notify requestor.• Edit the action named Approve and move to shared calendar. Set Action 1 to Move to shared calendar. Set Action 2 to Delete request.• Edit the action named Sign up for class. Set Action 1 to Request to attend class. Set Action 2 to Email registration contact.
Internal Training Sign Up Web Part	<p>On the Training Central tab (the default page):</p> <ul style="list-style-type: none">• On the Internal Training Sign Up web part menu, select Actions Show Admin• On the Sites & Lists page, set the site URL to the Training Central site, and select the Training Class Instance list
My Evaluations Pending Web Part	<p>On the Training Central tab (the default page):</p> <ul style="list-style-type: none">• On the My Evaluations Pending web part menu, select Actions Show Admin• On the Sites & Lists page, set the site URL to the Training Central site, and select the Training Evaluation list

Security Setup

Task	Description
Training Approval Site	Manage users on the site to set up site groups as follows: <ul style="list-style-type: none">• Contributor: Everyone who should use this site to request training.• Administrator: Assign at least two people, one to be the primary administrator and one as a backup. These people will maintain site permissions and have access to make any other changes to the site.
Training Approver Cross-Site Group	Create the Training Approver cross-site group. Populate with someone who will administer the vacation process. Either you or this person can add more people to approve vacations.
Shared Calendar	Change permissions on the Shared Calendar list as follows: <ul style="list-style-type: none">• Remove all existing groups or users• Add everyone who should have access (usually this is all authenticated users) to this site to see vacations with View items permission. Alternatively, you could add the site's Contributor group, but change its access in this case to only View items.• Add the Training Approver cross-site group with View, insert, edit, delete items permission
Admin Navigation List	Change permissions on the admin navigation list as follows: <ul style="list-style-type: none">• Remove all existing groups or users• Add the Training Approver cross-site group to have View list items permission• If desired, add anyone who is not a Site Administrator but who should see the tabs and pages named in the Admin Navigation list

Additional Implementation Options

If you have set up multiple training sites, you can set up one additional site, and change the Active Displays in that site to pull information from all the other sites. This is useful for a human resources or payroll processing view of everything.

The shared calendar in the Training Approval solution is the same as the shared calendar in the Vacation Approval solution. Thus, you may wish to set up a Vacation Approval solution and configure it to use the shared calendar in the Training Approval site. It is recommended that the Vacation Approval site send information to the Training Approval site because the Training Approval site also must integrate with the Training Central solution.

Technical Reminders

Assumption: Your organization has imported user names and email addresses to the SharePoint user information. If not, certain automated emails in this solution may not work.