

Training Central SharePoint 2007 Solution Setup

Design Planning

This solution is intended for use with the Training Approval solution. Create the Training Central site first, then create the Training Approval site(s), and then return to these instructions and finish the Training Central setup. You can add additional Training Approval sites over time if needed.

Training Central is also useful on its own (without the Training Approval site) for maintaining a list of classes, the dates they are offered, and training materials. If you intend to do this, much of the setup below does not apply, and you may wish to remove any web parts that reference information from Training Approval sites.

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	Directions
Create Site	Create the site using the CorasWSC.TrainingCentral.v9.0.1 template.
Setup the Group Directory List	Open the list called Group Directory List . Modify the existing values for the Training Approval and Training Central records to have the appropriate Site URLs for your organization. Change the Title for the Training Approval site if appropriate, and add additional training approval site records if necessary
Re-connect the Training Classes web part on the Class Maintenance tab	Due to a known issue with Microsoft SharePoint Site Templates and MS List View web parts, the Training Classes web part may not display correctly. To fix it: <ul style="list-style-type: none">• Open the Class Maintenance tab.• In the left margin is a web part called Training Classes. Select Modify Shared Web Part from the web part menu.• For Selected View, choose Connected Webpart. (If a warning message box pops up, click OK.)• For Toolbar Type, choose No Toolbar.• Click OK. The Training Classes web part is intended to be a connected with the Enrollment Review - Upcoming Training web part. The connection will also have to be set up as follows: <ul style="list-style-type: none">• From the Training Classes web part menu, select Modify Shared Web Part.• After the page refreshes, open the web part menu again and select Connections.• Set up a connection to the Enrollment Review - Upcoming Training web part, making that web part consume the Class Title column.

Task	Directions
Fix the Training Evaluations MS list view web part	<p>Due to a known issue with Microsoft SharePoint Site Templates and MS List View web parts, the Training Evaluations web part may not display as designed. To fix it:</p> <ul style="list-style-type: none"> • Access the Training Evals page. • Locate the Training Evaluations web part and select Modify Shared Web Part from the web part menu. • For Selected View, choose Approve/reject Items. (If a warning message box pops up, click OK.) • For Toolbar Type, choose No Toolbar. • Click OK.

Security Setup

Task	Directions
Training Central Site Groups	<p>Set the permissions on the site as follows:</p> <ul style="list-style-type: none"> • Members (Contribute): People who work on internal training, such as class instructors, those who develop training materials and surveys, or someone in charge of class enrollment. • Visitors: Usually, you will want to allow everyone in the organization to read the site through anonymous access or all authenticated users (NT Authority\Authenticated Users). Information that should be hidden will be limited by security at the list level. • Owners: 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 Evaluation List	<p>Modify the permissions for the Training Evaluation list so that everyone in the organization can edit items in this list.</p> <ul style="list-style-type: none"> • When you go to the list's permissions page, you will need to select the option to Edit the list permissions directly and stop inheriting security from the parent. • You can then Grant Contribute access to either anonymous access or to all authenticated users (NT Authority\Authenticated Users) or the site's Visitors group • You may want to grant Design or other permissions to people in your organization who will be responsible for working with evaluations. • Remove all the other security groups except Owners. (Note: This list requires Content Approval, which prevents people from seeing items not assigned to them.)
Admin Navigation List	<p>Change permissions on the Admin Navigation list as follows:</p> <ul style="list-style-type: none"> • Remove all existing groups or users. • If needed, add anyone who is not a Site Administrator but who should see the Tech Admin pages named in the Admin Navigation list.

Additional Implementation Options

Make More Use of the Registration Contact

The Class Instance list includes a column called **Registration Contact**. If a name is filled in for this column, that person will receive an e-mail notification every time someone signs up for this class instance. However, this column is not displayed in the data entry form when the **Add New Training Class Instance** action is run. If your organization wishes to use Registration Contacts and have them receive these notifications frequently, you may want to edit the action and check the **Runtime** option for the **Registration Contact** column.

Notification of Evaluations to be Completed

When a training evaluation record is created, the individual to whom it is assigned will see it on the Home page of the Training Approval solution. You can create an action to notify people via e-mail immediately when the evaluation is created. This is a good exercise for gaining experience with the CorasWorks Workplace Suite. Here is a basic outline of what you would need to do:

1. First, create a page that shows the current user's pending evaluations. The URL of this page will be used in the notification email. If you intend to use only one Training Approval site in your organization, you could use the Home page of the Training Approval site instead, and skip this step.
 - a. Add a page to the Training Central site. In the Cascading Navigation list, create an entry for the page or modify one of the existing entries with a page title of "extra page." You can simply give it a new Page Title, check the Display column, and begin using the extra page.
 - b. Put a web part on the new page that displays the current user's training evaluations. The easiest way to do this is to export the My Evaluations Pending web part from the main page of the Training Approval site, then import it to your new page.
2. Create a new Email Item Link action (using the Tech Admin | Actions Wizard page) called "Evaluation pending email notification." In the email body, type the link to the page you created above and some appropriate text.
3. Create a new Chained Action called "Initiate evaluations and send e-mail." Make the first action the "Initiate training evaluations" action, and the second action your new "Evaluation pending e-mail notification" action.
4. On the Training Central Class Maintenance page, add the new "Initiate evaluations and send e-mail" action to the the Enrollment Review – Upcoming Training web part. (From the web part menu, select Actions | Show Admin, and then select the Actions tab.)

Technical Reminders

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