

Vacation Approval SharePoint 2007 Solution Setup

Design Planning

The Vacation Approval solution can be used as a standalone site for use by an entire organization. Often, though, organizations will want to set up multiple Vacation Approval sites independently of each other, by department for example. This will allow each site to have its own list of approvers and its own shared calendar. Before beginning, you should also consider whether or not you want to use the Training Approval solution with the Vacation Approval. See the Additional Implementation Options section for more information.

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.VacationApproval.v9.0.1 template.
Configure Chained Actions	Go to the Tech Admin Actions Wizard tab. If using Central Configuration: • Click Maintain Global Links. • Add a Global Link with the Name [VacAppr]. For the URL, use the URL of the current site. • Click Submit. If NOT using Central Configuration: • 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 Copy to shared calendar. Set Action 2 to Delete request.
Fix Vacation and Time Off Allocated web part	Due to a known issue with Microsoft SharePoint Site Templates and MS List View web parts, the Vacation and Time Off Allocated web part may not display the correct columns. To fix this issue: • Access the Time Allowed page. • Locate the Vacation and Time Off Allocated 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	Description
Vacation Approval Site	Manage users on the site to set up site groups as follows: • Members: Everyone who should use this site to request vacation. • 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.
Vacation Approvers SharePoint Group	Create a Vacation Approvers (or Time Approvers) SharePoint Group. Give group members permission to add members. Add to the group the person who will administer the vacation process to the group. Either you or this person can then add more people to approve vacations.
Vacation Requests Time Approver column	When a user requests vacation, they must select the person who can approve their vacation time. The only available selections should be those people in the Vacation Approvers group set up in the previous step. 1. Go to the Vacation Requests list and select Settings List Settings 2. Click the column Time Approver 3. Under “Choose from”, select the radio button for SharePoint Group and then select the name of the group you created (Vacation Approvers or Time Approvers) from the drop-down. 4. Click OK.
Vacation and Time Off Allocated List	Change permissions on the Vacation and Time Off Allocated list as follows: • Grant Design permission to those who will perform Content Approvals for this list. Usually, you would add the Vacation Approver SharePoint group, as well as someone in HR who will verify that the vacation someone enters for themselves is actually the vacation they are allowed to have. It is important that someone be available to approve/reject items entered by each employee into this list on a timely basis. • Other permissions (Members and Readers) should remain unchanged. (A separate Advanced list setting for Item-level Permissions allows people to see and edit only their own items.)
Shared Calendar	Change permissions on the Shared Calendar list as follows: • 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 Read permission. Alternatively, you could add the site’s Members group, but change its access to only Read items. • Add the Vacation Approver SharePoint group with Contribute permission.

Admin Navigation list	Change permissions on the Admin Navigation list as follows: • Remove all existing groups or users. • Add the Vacation Approver SharePoint group with Read 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.
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Additional Information

The PersonText field

The Shared Calendar list contains a field called PersonText. This field is used by the calculated field DisplayTitle. DisplayTitle combines the name of the person and the Title field (PersonText is necessary because the Person field is a SharePoint Person or Group lookup, so it cannot be used in a calculated field). DisplayTitle is then used in the CorasWorks calendar display. The PersonText field is populated by the “Approve and Move To Shared Calendar” action that should be run by Time Approvers.

This action was specially configured so the name of the person is copied from the Vacation Request list into the Shared Calendar’s Person field and also into the PersonText field. If you edit this action, this special advanced action configuration may be broken. This is because the Person field could only be copied into two fields by editing the “Copy To Shared Calendar” action’s XML directly. Thus, before editing the action, you may want to make a backup of the action definition file so you can compare the files or restore the original action.

Additional Implementation Options

There is no reason for users to always have to go to the Vacation Approval site to request vacation, especially if you have another site on your intranet where you have information about vacation or administrative tasks. For example, you may have information on the HR homepage about requesting vacation, or links to commonly needed administrative activities on the department home page. Or, if you use SharePoint’s My Site feature, people may have a list of quick links there.

You can add the action to request vacation to any SharePoint site. Simply add a CorasWorks Action Selector web part to the page, and then go to the **ACTIONS** tab on its administration interface and add the **Request vacation or time off** action that resides in the Vacation Approval site. Update the Vacation Approval site with instructions such as *“TIP: You can use the “Request vacation or time off” action from your My Site to request vacation.”*

If you have set up multiple vacation 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 Vacation Approval solution is the same as the shared calendar in the Training Approval solution. Thus, you may wish to set up a Training Approval solution and configure the Vacation Approval solution to use the shared calendar in the Training Approval site. It is recommended that the Vacation Approval 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, some of the automated emails in this solution will not work.