

The Employee Reference Solution End User Guide

Solution Description

The purpose of this solution is to provide a framework for new employee orientation, as well as a reference for all employees to find key reference information from around the organization. A method is provided for people to feed the system with hyperlinked information stored anywhere on the company network.

Useful Capabilities

1. Any new employee can come to a page and follow a logical interface to learn things the company wants them to know.
2. Existing employees can come to a page to follow a logical interface to find information they commonly need or the company wants them to know.
3. People in the organization responsible for information that employees must know have a way to add information via the interfaces referenced in 1 and 2 above.
4. Information must first be reviewed before being displayed broadly to employees, and there is a logical interface for this and other administrative tasks.

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

Configuration

1. Edit the entry in the Work Essentials Directory list in the Employee Reference site that points to the Workplace Essentials List within that site.
2. Create a Workplace Essentials list in any SharePoint site on the intranet that has information to display inside the Employee Reference solution. Make sure each of these lists allows "Read" access to everyone in the organization. Add the URL to that site to the Work Essentials Directory list in the Employee Reference site.

Common Setup Changes

1. The Site Admin should put a SharePoint alert on all the Workplace Essentials lists that are created to be alerted to new items or changes. This will ensure sufficient review.
2. After trying the out-of-the-box categories, you may grow to have a large number of entries. You can add additional values to the **Category** column to help users navigate through the entries.
3. If you change the views, be careful to check both the Filtering tab and the Static Grouping, as many combinations are used for web parts throughout the site.

Additional setup changes and suggestions can be found in the [Employee Reference Setup Guide](#), available online.

How to Use the New Employee Solution

Data Population

Have a group of people put entries in the Workplace Essentials lists in their various sites to create links to display on the home page. Links to do this are provided on the **Suggest** tab.

Employee Site Admin Pages

1. Someone must take on the role of Employee Site Administrator. It is a good idea for this person to have a backup that also receives alerts. (Advanced Tip: The primary site administrator could create an Outlook rule to forward these alerts to the backup. Turn on this rule when the primary site administrator is out of the office.)
2. The site admin pages are accessed by the drop-down menu under the **Site Admin** tab.
3. First, the site admin can configure the various sites from which the Employee Site rolls up links. Do this using the **Maintain Work Essentials Directory List** view.
4. Next, the site admin is primarily concerned with reviewing item links to include for viewing on this site. Use the **Review Items to be Displayed** option. Items will default the **Reviewed** column to "No." The Site Admin must type the word "Yes" into the **Specify your own value** box next to the **Reviewed** column for an item to be visible to users. (This manual setting is used to prevent people from creating entries and selecting "Yes" from a drop-down list, causing items to display without review.)

New Employee Page

The New Employee tab has a nice example of combined static and dynamic grouping. It has static grouping on the "Display Filter" column, and within this, it groups dynamically on Category values.

One web part, **New Employee Info**, displays entries that do not include a link. This is perfectly acceptable. Instead, the title is clickable and will take the user to the item, where the description is displayed. The other web part, **New Employee Links**, displays Titles and Links, but not descriptions, as it is assumed this would be redundant.

Understanding the Workplace Essentials List

The Workplace Essentials list template is carefully planned to control the display of items, while also allowing your organization to customize values for your unique needs. The list template includes the columns described in the table below.

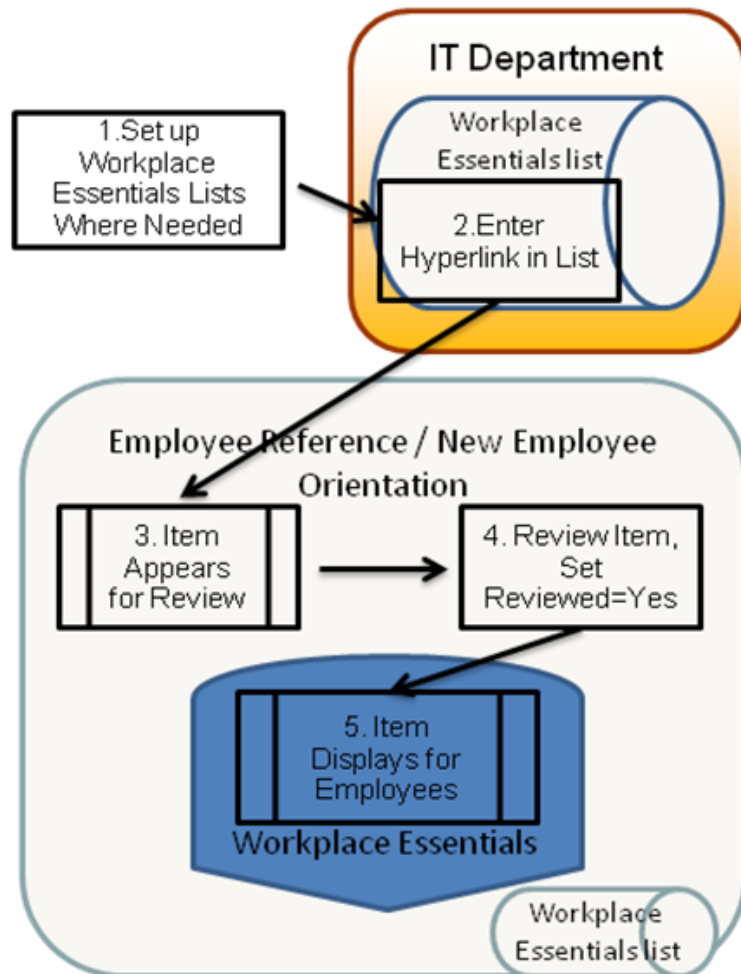
Column Name	Values and Information
Display Filter	<p>This column is used for hard-coded “static grouping” in the site.</p> <p>Must See – This information will display first and with more detail. It is intended to be used sparingly, because items in a large list will be ignored. Static filters are hard-coded to this value, so if you eliminate this value, you must change the filters.</p> <p>Good to Know – These items are still important, and employees can expand this section when they want to learn more about an item.</p> <p>New Employee Only – These items will show up on the New Employee page, but nowhere else.</p>
Category	<p>Used for dynamic grouping.</p> <p>If you wish to add additional ways to slice or present your data, adding additional choices to this column is the way to do it. Several displays use dynamic grouping on the Category column, so new category groups (values) will automatically be added to displays.</p> <p>Note: If you find that the categories correspond to the site they are coming from, you may want to check “Group by Sites” on the web part’s Display tab (on the administration interface), instead of using category values.</p>
Reviewed	<p>No – Default</p> <p>If set to “Yes,” items will be visible in the appropriate displays on the first two tabs. Other values will not display in the Employee Reference solution for general users.</p>
Item Scope	<p>Beyond Site –Default. This means items will roll up to the central New Employee/Employee Reference site.</p> <p>This Site – Items will only be visible in the current site where the Workplace Essentials list they are in actually exists. No displays in the Employee Reference solution make use of this value.</p>
Expires	<p>The date after which this item should not display. This value is required, and defaults to Dec 31, 2099.</p>

Suggest Tab

Anyone who visits the Employee Reference site can suggest content to be included. The Suggest tab provides an easy way for them to do this. The person making the suggestion must know the URL of the content to be included. If the site containing the content has a Workplace Essentials lists set up, then the site will appear on the Suggest tab and the user can follow the on-screen instructions to add their item. It will not display for all users until it has been reviewed by the administrator.

If the person does not know where the content they wish to include exists, or the site containing the content has not been set up with a Workplace Essentials list, the person could still make a suggestion inside the Q and A list, which is shown at the bottom of the page.

Employee Reference Process Diagram



1. Workplace Essentials lists are set up around the intranet, wherever someone is able to maintain them.
Benefit: Keep this list in the content owner's site so they feel ownership and keep it current.
2. Hyperlinks are entered in any Workplace Essentials list.
3. * New Item appears for Review.
4. The Workplace Essentials Admin reviews Category and Display Filter columns. If appropriate, sets Reviewed=Yes.
5. * Displays use the Category and Display Filter to control what is displayed where so the new or existing employee can find needed information.

* = Automated

Key Features:

- For information that needs to be shared but is not currently housed on the intranet, the information can be saved directly in the Description field in the same list.
- The Display Filter column is used in static groupings and the values highlight things in a certain way for new employees.
- The Category column is used in dynamic grouping so that organizations can add any category that they need. Samples are provided.
- The Workplace Essentials list can be used within a site to make up a menu of reference information for the current site. If this is done, you can set the information to display in both the current site and the Employee Reference site, or only the current site.