Employee Reference Solution Setup

Design Planning

The Employee Reference (also referred to as the New Employee Orientation) solution is essentially a dashboard that pulls information from any existing sites in your SharePoint implementation. To ensure that it can display information from any site, it requires the creation of a Workplace Essentials list on each site that it pulls from. The Employee Reference solution also contains its own Workplace Essentials list for you to enter information and links that are not maintained in any other site.

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 from the CorasWSC.EmployeeReference.v8.0.1 template.
Setup the Work Essentials Directory List	Open the Work Essentials Directory List. Modify the existing values and replace them with 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
Workplace Essentials List Template	Save the Workplace Essentials list as a list template. From the List Template Gallery, save the list template file to a place where you can use it again. Upload this template to the List Template Gallery in any site collection where you will need a Workplace Essentials list.
Create Workplace Essentials Lists	In any site that has information that may be needed in the Employee Reference, create a Workplace Essentials list from the list template created in the previous step.
Work Essentials Directory List	Update this list to remove the sample data and add the Title and Site URL of any site in which you have placed a Workplace Essentials list.
Update Web Parts that are Based on the Directory List	Almost all the web parts in this solution are configured with the "Based on Directory List" setting. Go to each tab in the site (don't forget all the drop-down view pages under Site Admin), and for each web part, do the following: • On the web part menu, select Actions | Show Admin • On the Sites & Lists tab, select Work Essentials Directory List from the Directory List Name drop-down • For the Directory List View, select Active • Click OK

Security Setup

Task	Directions
Employee Reference Site Groups	Set the permissions on the site as follows: • **Contributor**: A small group of people who will maintain and review the information in this site, usually in a role such as Human Resources or Corporate Communications. • **Reader**: Allow everyone in the organization to read the site through anonymous access or all authenticated users (NT Authority\Authenticated Users). • **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.
Q and A List	Modify the permissions for this list so that everyone in the organization can add items to this list. Do this by granting View, edit list items permission to either anonymous access or to all authenticated users (NT Authority\Authenticated Users).
Admin Navigation List	Change permissions on the Admin Navigation list as follows: • 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

On the "Site Admin | Review Items to be Displayed" tab, you may want to create and add actions to the web parts to send an email to the person who created or modified the items being reviewed. This would allow those doing Employee Reference maintenance to very easily ask them questions or direct them to make changes to items.

Technical Reminders

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