

Performance Review Solution Setup

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	<p>Create the site from the CorasWSC.PerformanceReview.v9.0.2 template.</p> <p>Note: If you do not have the version 9.0.2, you must download it from CorasWorks Central (http://central.corasworks.net/PremierSuite/atab2.aspx) or contact CorasWorks support (Support@CorasWorks.net). The earlier version of this solution is missing several pages.</p>
Connect the InfoPath form	<ol style="list-style-type: none"> 1. Under Settings for the Performance Review library, click Form Library Settings 2. Click Advanced settings (under the General Settings heading) 3. On the Form Library Advanced Settings page, click “(Edit Template)” under the “Template URL:” in the Document Template section. This will open Microsoft Office Infopath. Inside Infopath: <ol style="list-style-type: none"> a. Go to Tools\Data Connections. In the Data Connections window, select the Submit to SharePoint Library connection and click thte Modify button. b. Enter your Performance Review site’s URL in the SharePoint form library field. c. Click the Next button. d. Click the Finish button. Click the Close button. e. Go to File\Save. f. Go to File\Exit. 4. Back at the SharePoint Advanced Settings page, click Close.
Fix the web part on the Create page	<p>Due to a known issue with Microsoft SharePoint Site Templates and MS List View web parts, the web part on the Create (default) page may not display the correct columns. To fix it:</p> <ul style="list-style-type: none"> • On the Create page • Under Site Actions, select Modify Shared Page • For the Performance Review Create web part, select Modify Shared Web Part from the web part menu. • For Selected View, choose All Forms. (If a warning message box pops up, click OK.) • For Toolbar Type, choose Full Toolbar • Click OK.
Delete the sample	<p>When ready, delete the sample performance review form that came saved with the template.</p>

Security Setup

Task	Description
Site groups	Set the permissions on the site as follows: <ul style="list-style-type: none"><li data-bbox="548 401 1406 537">• Contributor: Consider setting only managers to have permission to contribute to the Performance Review library. They can email form information to individuals or set item-level security on forms so that people cannot see each other's reviews.

Technical Reminders

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