

Publishing Checklist

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1 Drafts Folder File Updates

Approval Sheet – Major Revision

See [Tips & Tricks: Document Approval Sheets](#).

- ☐ Update details summarizing this revision in the Document Approval Sheet (DAS).

Document Approval Sheet

Document Details

HSE0001 – Document Management

- Revision – 6.0
- Revision Date – December 20, 2016
- Effective Date – January 1, 2017

Scope

This document sets forth the lean process by which Health, Safety, & Environment (HSE) and Operations (OPS) documentation used in Deep Water – Gulf of Mexico (DW-GOM) will be maintained and updated in SharePoint, in accordance with expectations for document management and records retention.

Replaces

This document is replacing in its entirety the following document:

- HSE0001 Rev. 5.0.

- ☐ Capture an image of approvals collected in the SharePoint workflow and paste in the Authorization section, as shown.

Authorization Required approvals (collected in SharePoint)

Tasks

This workflow created the following tasks. You can also view them in [Workflow Tasks](#).

Assigned To	Title	Due Date	Status	Related Content	Outcome
<input checked="" type="checkbox"/> Bennett, J.	Please approve Publishing Checklist	14/10/2016	Completed	Publishing Checklist	Approved

Approval Sheet – Minor Revision

See [Tips & Tricks: Document Approval Sheets](#).

- ☐ For a minor revision, *do not change any information in the first five sections*. Include proof of approval in the Minor Revisions section as shown.

Minor Revisions

Authorization of Minor Revisions

Minor revisions may be necessary to clarify document content, but must not be used to alter, add, or remove requirements set forth in a document. The revisions authorized by the signatures below are recorded in the Change Matrix.

Rev 6.1

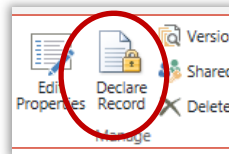
Tasks

This workflow created the following tasks. You can also view them in [Workflow Tasks](#).

Assigned To	Title	Due Date	Status	Related Content	Outcome
<input checked="" type="checkbox"/> Bennett, J.	Please approve Publishing Checklist	14/10/2016	Completed	Publishing Checklist	Approved

Change Matrix – Major Revision		See Tips & Tricks: Change Matrices.
<input type="checkbox"/>	Create a new tab in the Change Matrix spreadsheet and record details about changes for the major revision on this new tab.	
Change Matrix – Minor Revision		See Tips & Tricks: Change Matrices.
<input type="checkbox"/>	Add rows at the top of the latest major revision tab of the Change Matrix spreadsheet to record details about changes for the minor revision.	
Controlling Document		
<input type="checkbox"/>	Confirm all changes in the revised document are accepted or rejected.	
<input type="checkbox"/>	Remove any Draft indicators or watermarks.	
<input type="checkbox"/>	Confirm document footers reflect correct Date and Revision.	
<input type="checkbox"/>	Test/fix front page navigation links (e.g. Document Suite Map), if any.	
<input type="checkbox"/>	Download copies of the ready-to-publish draft files to a local folder: <ul style="list-style-type: none"> • Controlling document • Document Approval Sheet • Change Matrix 	

2 Drafts Folder Records Declaration

<input type="checkbox"/>	<p>In the Drafts folder, select the ready-to-publish:</p> <ul style="list-style-type: none"> • Controlling document, • Document Approval Sheet, and • Change Matrix, <p>then click Declare Record in the FILES tab.</p>	
<input type="checkbox"/>	<p>Confirm the following options are selected in the record declaration dialog, and click OK:</p>	
	<div> <div>TRIM Workgroup *</div> <div>Upstream _ Single File Plan</div> <div>▼</div> </div> <div> <div>File Plan Record Type Name *</div> <div>Policies, Standards, Guidelines and Procedures [UP_SF]</div> <div>▼</div> </div>	

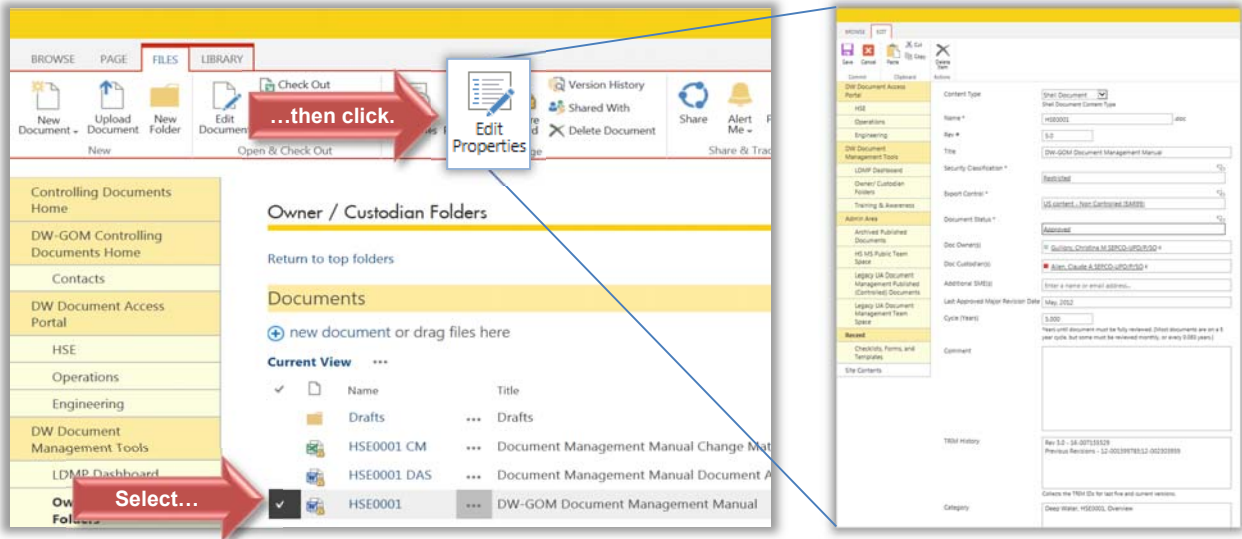
3 Document Folder Update, Clean Up, and Publish

Upload New Versions

- ☐ Confirm file names and extensions for locally-saved files (saved at the end of stage 1 above) match those in the document folder.
- ☐ Upload or drag and drop local files to the document folder. **Do not delete existing files.** *Make sure the **Add as a new version to existing files** checkbox in the upload dialog is checked. If prompted that a file with the same name exists, select “Replace It”.*

Update Controlling Document Metadata

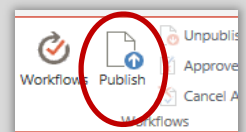
See [Tips & Tricks: Metadata Explained](#).





- ☐ Make any changes needed to **Title**.
- ☐ Update **Rev #**.
- ☐ Confirm **Document Status** is set to “Approved”.
- ☐ Confirm the **Doc Owner(s)** field is correct.
- ☐ Confirm the **Doc Custodian(s)** field is correct.
- ☐ Confirm **Additional SME(s)** are listed correctly, as appropriate.
- ☐ **Major Revision:** Change **Last Approved Major Revision Date** to reflect publication date.
Minor Revision: Do NOT change this field.
Ensures review cycle is triggered correctly. If revision qualifies as minor per HSE0001 definition, but approval date reset is desired, follow process for major revision, including comprehensive review of controlling document content and Owner sign off.
- ☐ Confirm **Cycle (Years)** is correct. *This is typically 5 years, listed as “5.000”.*
- ☐ To record additional information about the document or revision, update **Comments**.
- ☐ Confirm **Category** is correct (e.g. “Deep Water, HSE0001, Overview”).

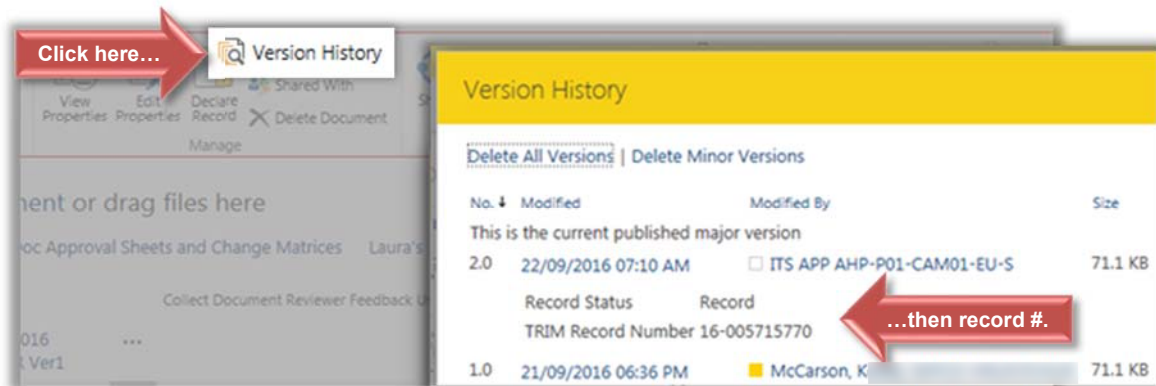
Publish

- ☐ Select the controlling document, then click **Publish** in the **FILES** tab



4 Drafts Folder Capture TRIM Record Number and Clean Up

- ☐ Once the Drafts folder document is captured in TRIM ( → ), go to the Version History and record the new **TRIM Record Number**.



Processing into TRIM usually takes less than 24 hours after declaration for small to medium documents, but can take longer for larger files. If the document still has an exclamation point after a week, see [Tips & Tricks: Troubleshooting](#).

- ☐ Record the new **Rev #** and **TRIM Record Number** in the **current published** document's **TRIM History** for future recall of past revisions, as shown below.

TRIM History

Rev 6.0 - 16-007686990;
 Rev 5.0 - 16-005715770;
 Previous - 12-001599760-12-002123147-12-002305100

- ☐ Delete files from the Drafts folder.