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).

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

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.
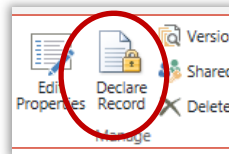
Change Matrix – Major Revision	*See Tips & Tricks: Change Matrices.*
☐	Create a new tab in the Change Matrix spreadsheet and record details about changes for the major revision on this new tab.
Change Matrix – Minor Revision	*See Tips & Tricks: Change Matrices.*
☐	Add rows at the top of the latest major revision tab of the Change Matrix spreadsheet to record details about changes for the minor revision.
Controlling Document	
☐	Confirm all changes in the revised document are accepted or rejected.
☐	Remove any Draft indicators or watermarks.
☐	Confirm document footers reflect correct Date and Revision.
☐	Test/fix front page navigation links (e.g. Document Suite Map), if any.
☐	Download copies of the ready-to-publish draft files to a local folder: • Controlling document • Document Approval Sheet • Change Matrix

2 Drafts Folder Records Declaration

|	
☐	In the Drafts folder, select the ready-to-publish: • Controlling document, • Document Approval Sheet, and • Change Matrix, then click **Declare Record** in the **FILES** tab.
☐	Confirm the following options are selected in the record declaration dialog, and click **OK**: **TRIM Workgroup *** Upstream _ Single File Plan **File Plan Record Type Name *** Policies, Standards, Guidelines and Procedures [UP__SF

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.*
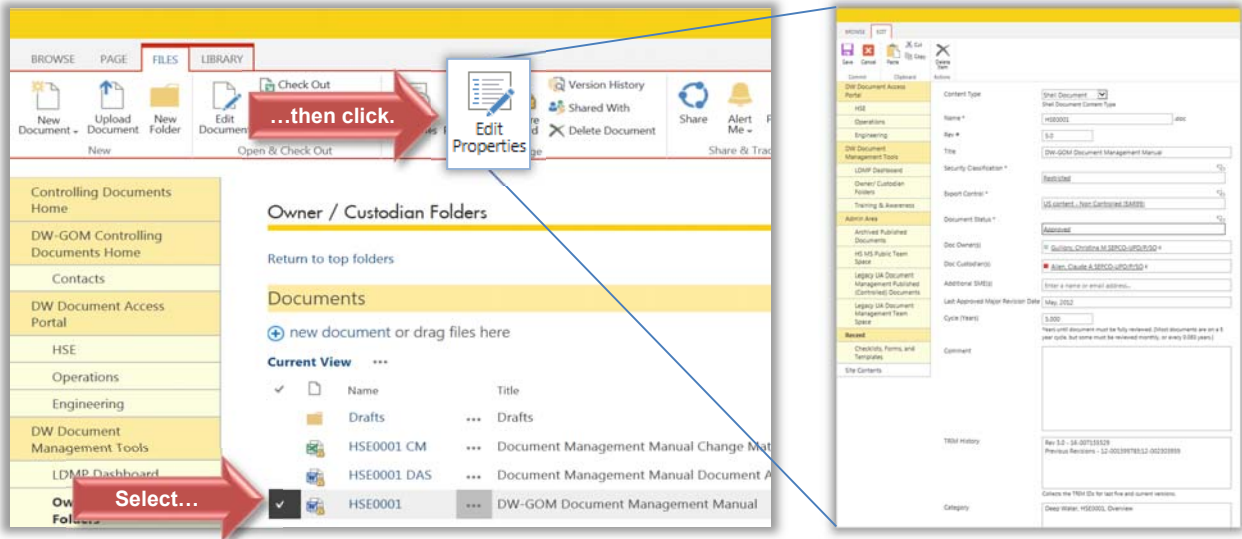
|	
☐	Make any changes needed to **Title**.
☐	Update **Rev #**.
☐	Confirm **Document Status** is set to "Approved".
☐	Confirm the **Doc Owner(s)** field is correct.
☐	Confirm the **Doc Custodian(s)** field is correct.
☐	Confirm **Additional SME(s)** are listed correctly, as appropriate.
☐	**Major Revision:** 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
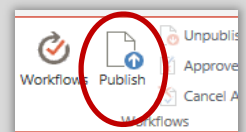
4 Drafts Folder Capture TRIM Record Number and Clean Up

☐ Once the Drafts folder document is captured in TRIM (![Word icon] → ![Word lock icon]), go to the Version History and record the new **TRIM Record Number**.

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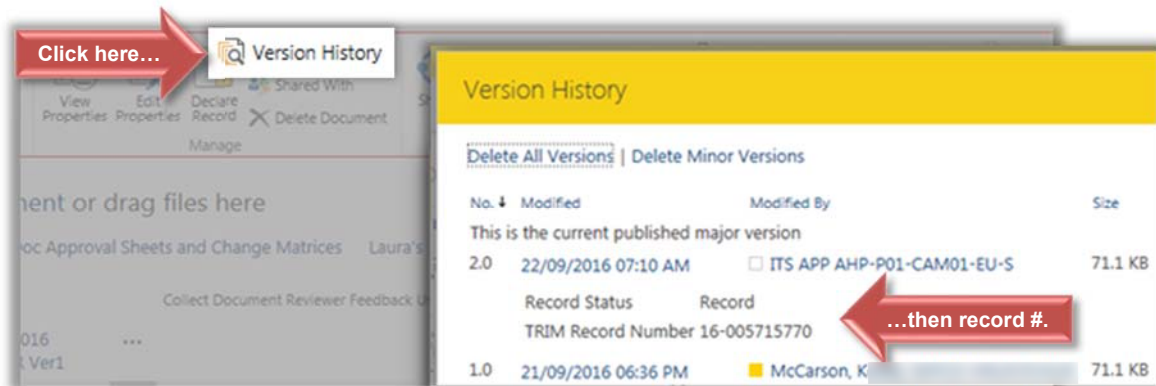
Processing into TRIM usually takes less than 24 hours after declaration for small to medium documents, but can take longer for larger files. If the document still has an exclamation point after a week, see Tips & Tricks: Troubleshooting.

☐ 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.