Getting Help

Tips & Tricks

Hints to help you master document management.

Help is Available

❏ While the LDMP is an Owner and Custodian driven and controlled process, we recognize that there will be tasks that you need help with, because:

   ❏ Expert help can accomplish what's needed much more time effectively,
   ❏ SharePoint and Word issues can stymie even the experts at times, and
   ❏ There is no way to grant all necessary permissions to everyone involved in document development.

❏ We have developed the Tips & Tricks library to help get you through as many setbacks as we can anticipate, and application Help menus and Google can also be very useful.

❏ For small content revisions to existing documents, our hope is that everything has been set up such that the work is as easy as possible for the Custodian.

❏ When you encounter difficulties or need library-level support, however, this slide pack is intended to direct you to the appropriate resource, and provide a clear and comprehensive template for your request, to get you the help you need as quickly as possible.

❏ The resources listed in these slides are targeted specifically for DW-GOM Controlling Documents. Should none of these resources be available, or if you need more help than Site Owners can provide, review your SharePoint Support Options at this link.

Adding Reviewers/Approvers

❑ If review or approval is needed from persons other than the Owner or Custodian, the **Owner and Custodian** have the ability to **add reviewers and approvers** to their **Drafts folders**, as follows:

    ❑ Reviewers require **Contribute** permissions.

    ❑ Approvers require **Approve** permissions.

    See Tips & Tricks: Permissions in SharePoint.

❑ In addition to folder-level permissions, however, **Site Owners** must grant new reviewers and approvers permissions **at the library level** in order to interact with review and approval workflows.

❑ Contact **Site Owners** listed on the DW-GOM Controlling Documents Home Page to add new people to the appropriate groups as follows:

    ❑ Reviewers must be added to **UA Control Framework HSSE Document Management Members**.

    ❑ Approvers must be added to **Approvers**.

❑ The following email template can be directed to **Site Owners** in order to submit your request.

Additions to DW-GOM Controlling Documents MembersAppovers Groups.msg

New Document Request

❑ In order to add a new document to the DW-GOM Controlling Documents library, you will need to contact the **Site Owners** listed on the <u>DW-GOM Controlling Documents Home Page</u>.

❑ **Provide the following** information in your request:
   - ❑ Intended document discipline (HSE or OPS)
   - ❑ Proposed Title for the new document
   - ❑ Name of Document Owner
   - ❑ Name of Document Custodian

❑ The **Site Owners** will select a **new number** for your document, set up a **document folder and Drafts subfolder** with the **correct permissions**, and make sure the Owner and Custodian are included in the **Approvers** group. *(Site Owners, see <u>Tips & Tricks: Creating New Document Folders</u>.)*

❑ The following email template can be directed to **Site Owners** in order to submit your request.

Folder and Doc Number Request for New DW-GOM HSEOPS Document.msg
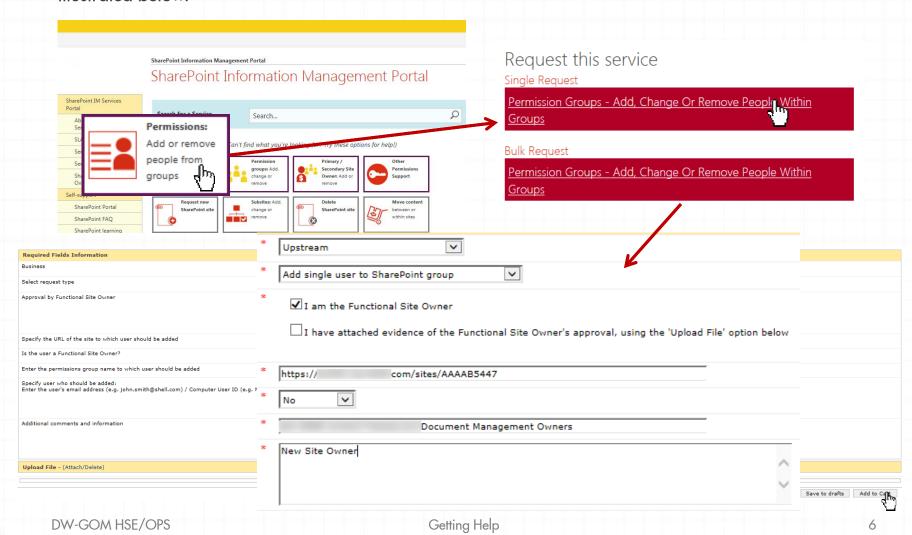
Role Handover – Owner/Custodian

❑ Outgoing **Owners and Custodians** can grant their replacements Full Control permissions for document folders and Drafts subfolders. They can also update the metadata for their documents to reflect new Ownership and Custodianship. See <u>Tips & Tricks: Metadata Explained</u> and <u>Tips & Tricks: Permissions in SharePoint</u>.

❑ As in the case of reviewers and approvers, however, new Owners and Custodians must be granted **library-level permissions** as well.

❑ Outgoing **Owners and Custodians** must contact **Site Owners** to have their replacements added to the **Approvers** group for the DW-GOM Controlling Documents library, and themselves removed from the group. (If the replaced Owner or Custodian will still have that role for other documents, please specify that they **not** be removed from the **Approvers** group.)

❑ The following email template can be directed to **Site Owners** in order to submit your request.

Document OwnerCustodian Role Handover.msg

Role Handover – Site Owners

❑ To add incoming or remove outgoing **Site Owners**, raise a request with **SharePoint IM Services** as illustrated below.

Accessing Old Revisions or Retired Documents

❑ Going forward in SharePoint, document revisions will be collected as published versions, and can be accessed by selecting the document in question, clicking **Version History** in the **Files** tab, and scrolling through the versions listed in the resulting window.

❑ Since 2012, all revisions have been captured as records in TRIM, and can be recovered by applying to **Site Owners**, who may have access to them through the TRIM Drop Zone, or may know if copies still reside in archives on SharePoint.

❑ For access to revisions not available in the version history, contact the **Site Owners** with as much information as you can provide about the document you're looking for, including:
  ❑ Document Number
  ❑ Document Title
  ❑ TRIM Record Number, if known/applicable
  ❑ Desired revision number(s)
  ❑ Approximate date(s) of revision(s) or retirement

Fixing Stuck Records

❑ While documents are being processed into TRIM (records repository), an exclamation mark (!) appears on the Document Type icon. When the document is successfully copied to TRIM and is officially a record, a lock will appear on the Document Type icon.

❑ This normally takes one or two days, but occasionally a document can get stuck somewhere in the process. Once stuck, it can no longer be modified or deleted, and cannot be redeclared. The Global Helpdesk must be contacted to make sure the declaration process is completed.

❑ In addition to a description of your problem, the Global Helpdesk will need the URL(s) of the file(s) that are stuck.

❑ The following email template can be directed to the **Global Helpdesk** in order to submit your request.

Problem Declaring a Record in SharePoint.msg