SERVICE EXCELLENCE

SharePoint Site Editors' Manual

P&H Mining Equipment Inc.
A Joy Global Inc. Company

ABOUT THE SERVICE EXCELLENCE OPERATING STANDARDS SITE

P&H has implemented the Service Excellence Operating Standards site as a self-contained system. The site provides important information to all stakeholders instantly, at any time, even as it acts as a collaborative environment for this information's ongoing development. Feedback, discussions, suggested changes, and task assignments are all tracked on the site itself, making the change process transparent and accountable.

The site is built on Microsoft's SharePoint development platform. By using SharePoint, P&H gains a powerful set of web-based tools that can be used immediately and later refined and customized according to its own needs.

ABOUT THIS MANUAL

This manual is intended for P&H employees who have editing privileges on the Service Excellence Operating Standards site. Employees with editing privileges can make changes to site content and participate in online discussions about the site. For an introduction to the Service Excellence site from a general user's perspective, see the *Service Excellence SharePoint Site User's Guide*.

The User's Guide includes information about:

- The site interface
- Search
- Leaving feedback
- Reviewing changes

Manual Maintenance and Contacts

[TBD]

Revision History

Version	Date	Name	Description of Changes
0.1	08/04/2011	John Cooper	Document initiation; first draft for review
0.2	08/12/2011	John Cooper	Draft for UAT participants
1.0	08/26/2011	John Cooper	Release of site

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USING THE SERVICE EXCELLENCE SHAREPOINT SITE

The Service Excellence Operating Standards site is more than just a web page. It's a collaborative environment in which many participants work together to improve the site content, using the site itself. In addition to the usual ways of collaboration such as face-to-face meetings, phone conversations, and e-mail, colleagues can discuss issues using the Discussions feature. (See "Discussions.") They also use the Discussions feature to record the details of their meetings and conversations. By doing so, they automatically create a record of the issues they find, their method of addressing the issues, and the timeline of site improvements.

By keeping all the details in one place, working entirely within the site provides complete transparency to a project's direction and tasks.

Preserving a Record: Maintaining the Audit Trail

To get the maximum benefit from the site, it's important to work in it, not outside it. Use the Discussions links at the bottom of each page to share ideas about how to improve the site.

- If you have a meeting about site improvements, copy the minutes and action items into a discussion on the site.
- If you have a productive face-to-face conversation about any aspect of the site, start a new discussion to share what you learned or decided.
- If a colleague sends you an e-mail about the site, move the e-mail thread to a site discussion, and then link the e-mail to the discussion as an attachment.

Any work on the site that doesn't take place in the site itself is potentially lost. Take advantage of the Service Excellence site's collaboration and transparency features by working within the site at every opportunity.

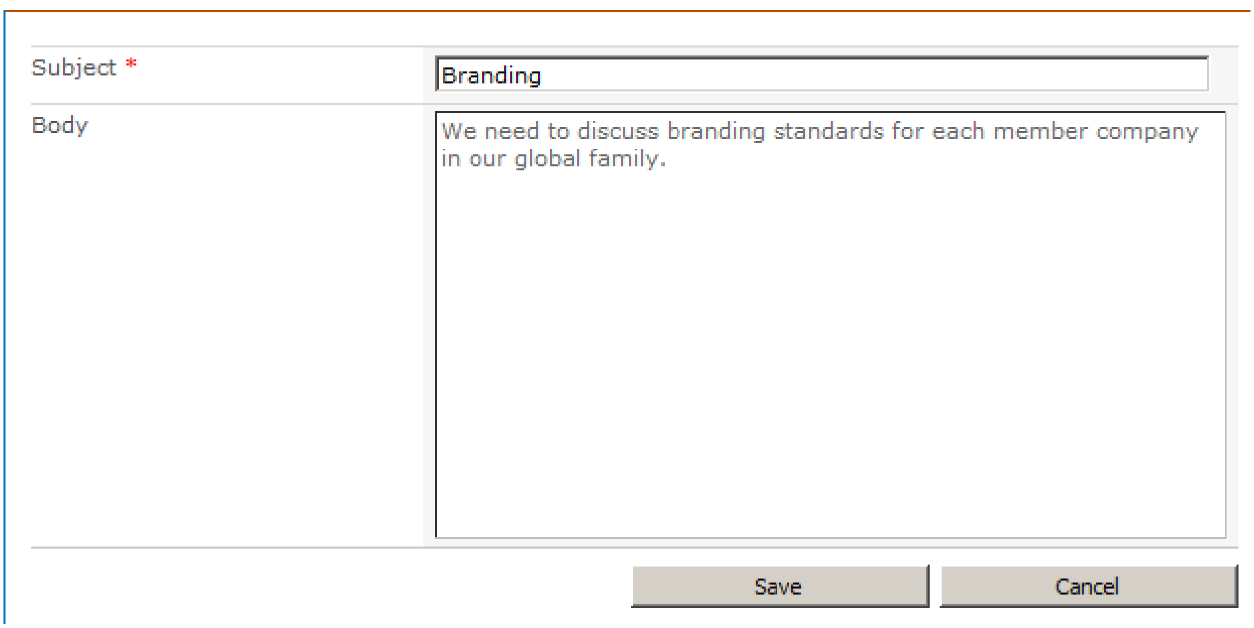
DISCUSSIONS

Users with ordinary (read-only) privileges to the Service Excellence site can submit feedback about information and pages on the site, but only editors can read and contribute to the Discussions feature. In SharePoint, Discussions work much like the commenting features of blogs. To automatically make an "audit trail" of content improvements, Editors and site administrators must use the Discussions feature to exchange thoughts about how a page might be improved.

For those who have editing privileges, the **Add new discussion** link appears at the bottom of each content page. Discussions already taking place appear above the **Add new discussion** link.

Starting a Discussion

To start a new discussion, click **Add new discussion**. A dialog box opens where you can type your comment. Type the subject of the discussion, just as you'd type a subject for an e-mail message, and then type your comment in the Body section of the dialog box. You can use the editing features to add formatting to your comment, and you can spell check your comment before you publish it. When you click the Save button, your comment will be published for others to read.



Discussion Tips: Subject Lines and Replies

Discussions should take place on the page that has the issue being discussed. In other words, don't start a discussion on the "Introduction" page about problems on the "Quality" page.

Every issue should have its own discussion, and the subject of that discussion should state the topic issue. Good subject lines include:

- **Additional details in Quality Policy**
- **Corrections to paragraph 3**
- **Is the MinePro Responsibilities section clear enough?**

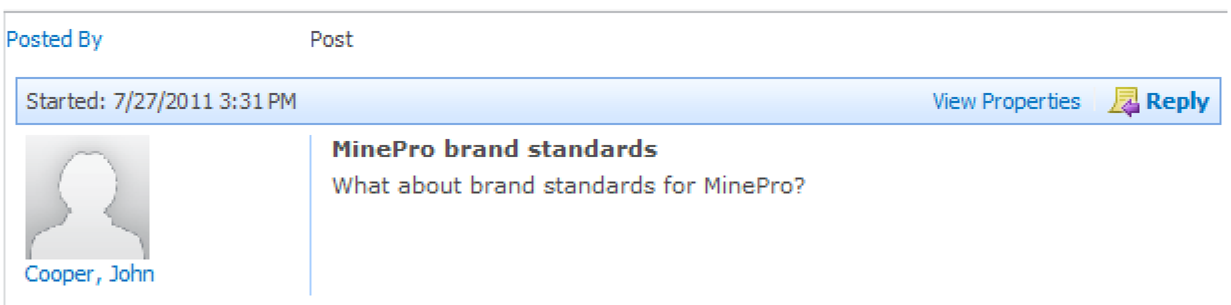
Bad subject lines are vague and don't give enough detail. Poor subject lines include:

- **Needs improvement**
- **Errors**
- **I don't understand**

Before you start a new discussion, read the subject lines of the discussions already taking place. If your topic is already being discussed, reply to that discussion instead of beginning a new one.

Reading and Replying to a Discussion

To read an existing discussion, click its title in the discussion list above the **Add new discussion** link.

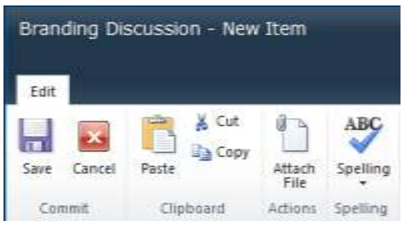


To add a comment to the discussion, click **Reply** in the upper right corner.

Writing and Editing a Comment

When you click **Add new discussion** or reply to a discussion, a dialog box opens where you can type your comment.

If you clicked **Add new discussion**, you are taken to the Subject field of a dialog box, where you can type a title for the new discussion. Because the titles of discussions cannot be formatted, the available editing tools are limited. You can cut, copy, or paste text to and from the title of the discussion.



When the cursor is in the Subject field, you can also attach a file to your comment or check the comment's spelling by using the tools above.

NOTE: For more information about the Ribbon in which tool icons appear, see the Ribbon section on page 8.

After you press the Tab key or click in the Body field to type the comment itself, the Ribbon changes to resemble the Ribbon you see when you are editing a page.

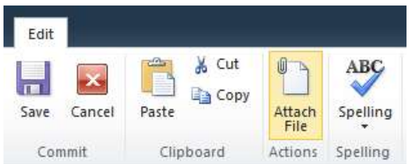
The Ribbon also includes the Insert tab. To access the tools on this tab, you must click it.

The Insert tab lets you insert a table, a picture, a link, or a file into your comment. For detailed information about how to use these and other editing tools, see the "Advanced Editing" section.

When you are done writing and editing your comment, click **Save** to publish it for others to read.

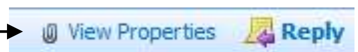
Adding an Attachment to a Comment

You can attach any file to any comment or reply. In the comment box, click the **Edit** tab, and then click **Attach File**. In the resulting dialog box, click **Browse**, navigate to the file, click **Open**, and then click **OK**. (The Attach File tool is highlighted in this screen shot.)



You can attach anything that you can save as a file, including meeting minutes, e-mail conversations, and screen shots.

When a comment or reply includes an attachment, a paperclip icon appears next to "View Properties" in the discussion list.



TIP: Because the paperclip icon is so small, it's an excellent idea to mention in your comment or reply that you have attached a file.

Keeping in Touch

To let users know when something happens on the site that might require their attention, SharePoint automatically sends alerts by e-mail. Alert messages remind users of pending tasks. Alerts can also notify participants in a discussion that new comments and replies have been added.

Alert messages always include a direct link to the appropriate area of the site. To view some sample alert messages, see the "Basic Approval Workflow" section in this document.

Staying Notified of New Comments

If you own the section to which you're contributing a discussion comment, you'll automatically receive alerts when others contribute to a discussion in your section.

NOTE: To see a list of section owners, click **Editor Tools** on the Quick Launch bar. The Service Excellence SharePoint Owners list appears below the calendar. Each section is listed together with its owners.

To stay involved with a discussion when you are not the section owner, make sure you are alerted when new comments are added to the discussion. To be alerted, view the discussion, click the **List** tab on the Ribbon, and then click **Alert Me** in the Share & Track group.

It is good practice to make sure you stay notified every time you leave a comment. If you aren't alerted about responses to your comment, you could not only miss those responses, you could miss important decisions that are made as a result of your input. Whenever you comment on a page that you do not own, click **Alert Me** to make sure you are notified of new comments.

An Alert Me tool also appears when you view the properties for a comment or reply. However, when you click the Alert Me tool in a comment or reply, you will only be alerted when there is a new reply *to that exact comment*. You will *not* be alerted to all new comments in the discussion. Usually, you should click the Alert Me tool that appears over the entire discussion list.

Inviting Others to a Discussion

You can invite others to a discussion by clicking **E-mail a Link** just above the Alert Me tool when you view a discussion. When you click **E-mail a Link**, a new Microsoft Outlook message window will open with a link to the discussion in the body of the message. You must manually fill in the recipients, give the message a subject, and add any comments you have to the message body.

EDITING PAGES

As a user of the Service Excellence Operating Standards SharePoint site with editing privileges, you can edit (make changes to) any of the site's pages.

Quick Start

To edit a page, follow these steps. (See the following sections for detailed explanations of these steps.)

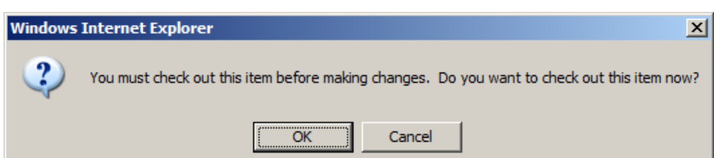
NOTE: *Make that all your changes are fully documented using the Discussions feature.*

1. Go to the page you want to edit.
2. Click **Site Actions**, click **Edit Page**, and then click OK in the confirmation dialog box.
3. Make your changes by selecting, removing, and inserting text, pictures, and tables. Use the tools on the Ribbon to format your changes.
4. In the Ribbon, click **Check In.** In the Check In dialog box, type detailed comments about the changes you made to the page.
5. In the blue navigation bar, click **Publish**, and then in the Ribbon, click **Submit**.
6. Type or select a site administrator who can review and approve your changes, and then click **Start**.

Editing a Page

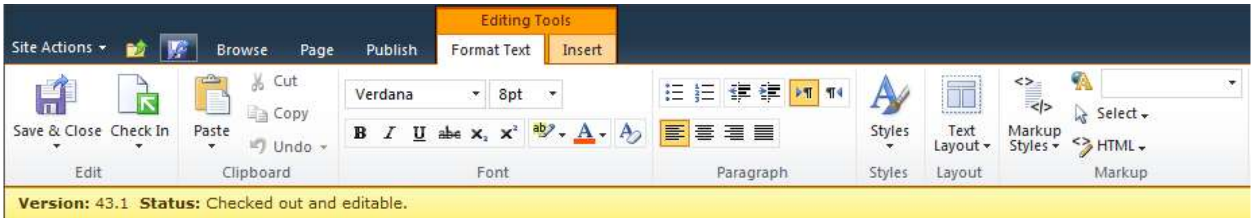
To edit a page, go to the page that you want to edit, and then do one of the following:

- Click **Site Actions**, and then click **Edit Page**.
- Click the Edit icon to the left of the Browse tab.



A dialog box asks whether you want to check out the page for editing. Click **OK**.

When you check out the page for editing, editing and formatting tools are made available on the *Ribbon*. Just below the Ribbon, the current version and status of the page appear in a yellow information bar.



The information bar goes away when you begin to edit.

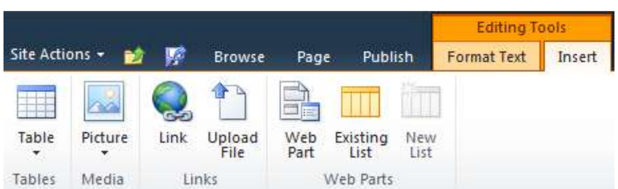
(If you are already familiar with the Ribbon in other Microsoft programs, you can proceed to "[Making Changes](#)" on page 9.)

The Ribbon

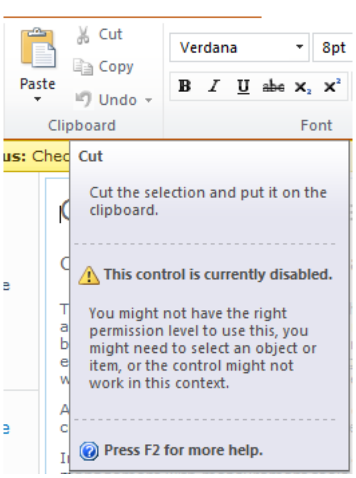
The Ribbon replaces traditional menus with a strip of controls that varies according to what you can do at any time. (The Ribbon was first introduced in Microsoft Office 2007.) If you are unfamiliar with the Ribbon, it may help to think of the tabs on the Ribbon as menu titles, and the icons and buttons on the Ribbon as the menu items. However, a significant difference between the Ribbon and traditional menus is that the Ribbon changes dynamically according to what you have selected. This gives you access to the tools you need the most, while keeping tools that don't apply out of your way.

When you first check out a page, the Ribbon appears with the Format Text tab active. (See the picture above.) The Format Text tab contains most of the tools you might need while you edit a page.

To see more tools, click **Insert** to switch the Ribbon to the Insert tab.



The tools on this tab let you insert various items, such as tables, pictures, and links, into the page that you are editing. To find out more about what any tool does, hover the mouse pointer above the tool until a tip appears.



The tool tip on the left contains information about the Cut tool. Not only does it explain the function of the tool, it helps explain why the tool is unavailable. In this case, there is no text selected to cut.

When a tool is unavailable, it appears in gray.

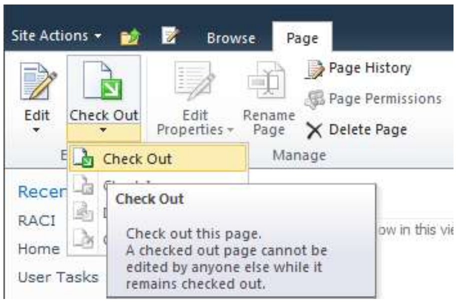
Section Owners

The section owners are responsible for monitoring and improving the content of each section (chapter) of the site. To see a list of section owners, click **Editor Tools** on the Quick Launch bar (near the bottom). The Service Excellence SharePoint Owners list appears below the calendar. Each section is listed together with its owners.

Section Owners: Protect Your Section!

The SharePoint system prevents anyone from editing a page while it is checked out to someone else. Therefore, you can prevent unauthorized edits and help maintain the integrity of your section by checking out the appropriate page. Check the page back in only when you have made changes that need approval, or when you want to have someone else make changes. After the changes are approved, check the page out again.

To check out a page without editing it immediately, browse to the page, click the **Page** tab in the navigation bar, and then click **Check Out** in the Edit group on the Ribbon.



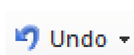
Readers and editors can contribute feedback and discuss the page even when it is checked out. Checking out the page only prevents changes from being made to the page content itself.

Making Changes

Use the tools on the Ribbon to make any changes you need to make to the page you are editing.

Tips:

- Put the cursor where you want to add text, or select text that you want to change, and then click around the Ribbon to see the actions that are available to you.
- Hover the mouse pointer over a tool or button to see a tool tip that describes its function. If a keyboard shortcut is available, it will also appear in the tool tip.
- Click the inverted triangle beneath a tool to see a list of related commands. You can hover the mouse pointer over a command to see what it does.



- If you make a mistake, the Undo button will usually reverse it. When the Undo button is available, you can also press Ctrl+Z to undo a change.
- To save your progress, click the triangle below the Save & Close tool, and then click **Save and Keep Editing**.
- If you change your mind about editing a page, click the triangle below the Check In tool, and then click **Discard Check Out**. All the changes you made will be discarded.

Checking the Spelling

It's a good idea to check the page's spelling before you submit your changes. However, because SharePoint doesn't offer a spell-check tool for page content, you'll have to use another program that includes a spell-check feature, such as Microsoft Word.

To check a page's spelling, first select and copy all of the page content.

- If you are in SharePoint's edit view (that is, if the editing tools on the Ribbon are visible), you can just hold down the Ctrl key and then press A (CTRL+A). Then, copy the content by clicking **Copy** on the Ribbon, or press CTRL+C.
- If you are not in SharePoint's edit view, you cannot press CTRL+A to select all content. (Doing so will select everything on the web page, including controls and logos.) Instead, click just before the first character on the page, drag to the end of the page while holding down the mouse or trackpad button, and then copy the selected text.

Next, launch your spell-check program and paste the page into the program by pressing CTRL+V. Use the method your program provides to check the spelling.

NOTE: In Microsoft Word, automatic spell-checking is enabled by default. Words that Microsoft Word does not recognize will appear with a wavy red line beneath them. To review these words one at a time, press the F7 key at the top of your keyboard.

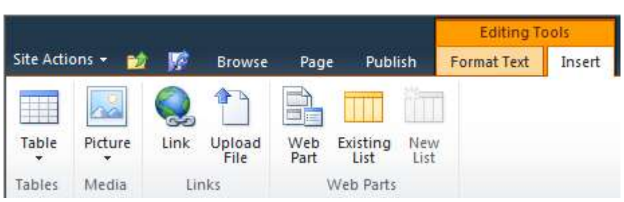
IMPORTANT! Although it may seem easiest to correct misspellings in Microsoft Word (or whatever program you are using) and then copy the changes from Word back into the Service Excellence site, doing this can cause formatting problems. If you copy content back into the site, the content's formatting (text, tables, and objects) may be changed or lost. Instead, switch from the program back to your web browser, and correct the misspellings in the site's edit view.

If you must paste content from Microsoft Word into the Service Excellence site, use the "Paste plaintext" tool on the SharePoint site to paste the content as unformatted text. Then, reapply the formatting in the site as needed. For more about this, see "Inserting Text from Microsoft Word" below.

Inserting Text, Tables, Pictures, and Links

You might want to insert content from another program to avoid having to re-create the content by using the tools provided by the Service Excellence site. Or, you might have content that is more complex than the site tools let you create. For example, you might want to insert a table including cells that span more than one row or column.

You can often do this by copying the content to the clipboard and pasting it into the site. In some cases, it may be more convenient to use the Table, Picture, or Link tool on the Insert tab to import the content.

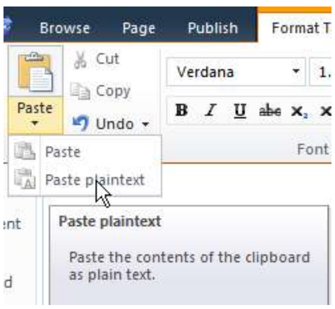


Inserting Text from Microsoft Word

You can copy text in Microsoft Word and paste it into the Service Excellence site (when it is in Edit mode). However, doing so could cause the following problems:

- Formatting styles that are not supported by the site will be lost.
- The type style of the pasted content might contrast with the type style used in the site, making it look messy and distracting.
- If your selection contains content other than text, such as tables or other objects, this content might not display correctly on the site.

To avoid these problems, make sure you do two things when you paste content from Microsoft Word into the site:



- Use the "Paste plaintext" tool to paste the text into the site. Then, apply headings, italics, or other special formatting as necessary by using the tools on the site.
- Make sure that you have only text selected in Microsoft Word. If the content that you are pasting includes tables or other non-text content, select the block of text before the content and paste it into the site. Then, return to Word, select the block of text that begins just after the non-text content, and paste it into the site, and so on.

Inserting a Table

You can create a simple table directly in the site by using the Table tool (on the Insert tab under Editing Tools, on the Ribbon). However, it can be difficult to adjust and format the table by using the tools on the site. Therefore, it is recommended to create and format your table in Microsoft Word, and then paste it into the Service Excellence site.

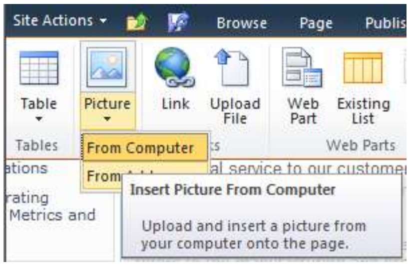
NOTE: SharePoint does not support all the table features that are available in Microsoft Word. Therefore, some features, such as shading, may be lost when you paste a table into the Service Excellence site.

To copy and paste a table, follow these steps:

1. In Microsoft Word, make sure the table appears the way you want it to appear on the SharePoint site. Adjust the cell widths, row heights, and so on as necessary.
2. Move the mouse cursor over the table. A small box that contains crossed arrows appears at the upper-left corner of the table. Move the cursor over the box and click once to select the entire table.
3. With the table selected, hold the CTRL key and press L (CTRL+L) to align the table to the left margin. (This step helps position the table on the SharePoint site.
4. With the table still selected, press CTRL+C to copy the table.
5. Switch to Internet Explorer to view the Service Excellence site. Make sure that the page is in Edit mode and that the cursor is placed where you want to insert the table. Press CTRL+V to paste the table into the site.

Inserting a Picture or Illustration

To insert a picture or illustration into the site, save the picture as a file on your computer. Then, on the Service Excellence site, use the Picture tool to insert the picture.



To insert a picture, follow these steps:

1. On the Ribbon, click the **Insert** tab under Editing Tools.
2. Click **Picture**.
   If you accidentally click the down arrow beneath the Picture tool to open its menu, click **From Computer.**
3. In the Select Picture dialog box, click **Browse** (to the right of the Name field).
4. Navigate to the picture file on your computer, select the file, and then click **Open**.
5. In the Select Picture dialog box, click **OK**.
   Leave the "Upload to" field set to "Site Assets."
6. If a Site Assets dialog box appears, click **Save**.

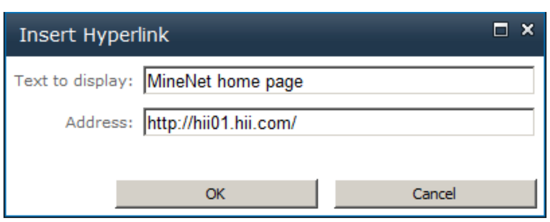
The picture will appear at the insertion point. If you need to adjust its size or position, use the tools on the Design tab that appears when the picture is selected.

Inserting a Link

To insert a link, click **Link** on the Insert tab.

In the "Text to display" field, type the text that will appear as a clickable link.

In the Address field, type the full URL of the link.



The options in this dialog box could be used to create the following link:

Visit the MineNet home page.

Getting Approval

The responsibility for making changes public to all users rests with the site administrators. When you submit your changes for final approval by using the steps in "Submitting Your Changes for Final Approval" below, you are sending the changes to the site administrators. Before you do this, make sure that you have fully discussed your changes with the section owner using the Discussions feature.

Checking In Your Changes

When you are done editing the page, follow these steps:

1. On the Ribbon, click **Check In.**
2. In the Check In dialog box, type a comment describing the location and type of change you made to the page, and then click **Continue**.

   Note: If SharePoint detects spelling errors on the page, the number of errors will appear in the Check In dialog box. If you want to review the errors, click **Cancel** instead of Continue. (See the "Checking the Spelling" section for information about how to find and fix spelling errors.)

Important: Your comment may be the only information the approver has about what changes you made to the page. It's a good idea to be as detailed as possible about the following:

- Where you made changes (section, paragraph, and sentence)
- The kind of change you made (did you add text? Delete text? Change text? Add a table or a picture?)
- What your goal was in making the change
- Any other details that might help the approver decide that your change is worthwhile

Leaving out any of these details could lead to a long discussion, or at least a delay in approval.

When you have checked in your changes, the page status (visible in the yellow status bar below the Ribbon) changes to "Checked in and viewable by authorized users." *Your changes are not public yet.* The changes will not be published until they are approved.

Submitting Your Changes for Final Approval

To send your changes to a site administrator for review, follow these steps:

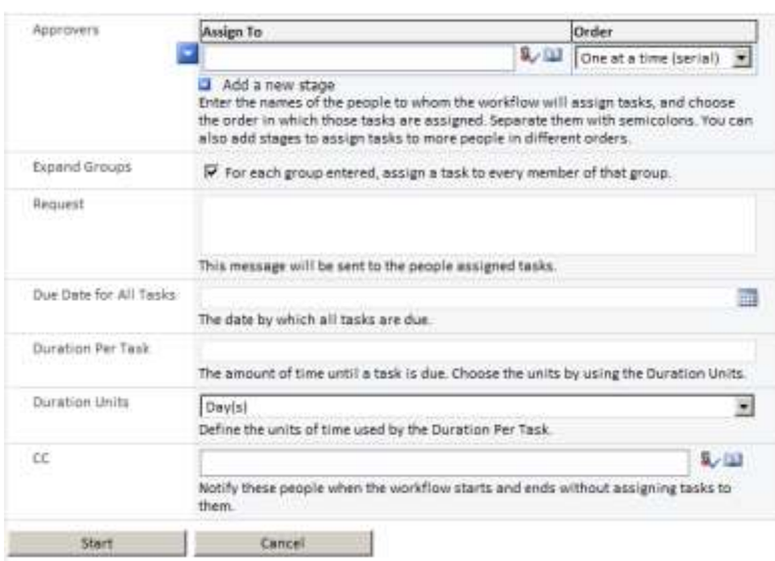
1. In the navigation bar, click **Publish**.
2. In the Publish ribbon, click **Submit.** You will see the form shown below (after this procedure).
3. The name of the approver should already appear in the Assign To field. If it does not, click in the Assign To field, and do one of the following:
    a. Type the name of the approver, last name first.
    b. Click the Check Names icon to confirm the name. If the name is valid and was typed correctly, it will appear underlined in the Assign To field. Go to step 4.

    \- OR -

    a. Click the Browse icon .
    b. In the **Select People and Groups** dialog box, type part of the name in the **Find** field, and then press the Enter key.
    c. Click the correct name, and then click **Add**.
    d. Click OK.
4. Optionally, in the **Request** field, type a message for the approving administrator.
5. In the next field, enter a due date for the task or choose a date by clicking the calendar icon.

    Note: Alternatively, you can enter the number of days, weeks, or other units before approval is required by using the duration fields below the due date field. If you do this, leave the due date blank.
6. Click **Start**.

The status changes to "Waiting for approval." The approver will automatically receive an alert about the task.



Change Visibility

After you check in your changes, the changes are visible to all users of the site who have editing privileges. However, *ordinary users who have read-only privileges to the site will* not *see the changes until they have passed final approval!*

Do not assume that what you as an editor see is the same as what general users of the site see. This difference is one of the reasons why leaving a full audit trail in the page discussions is so important.

Approval Notifications

When you send changes for approval, SharePoint sends an alert message to the approver. The message includes the information that you specified during submission and lists the steps that are required to continue the workflow to approval.

> **Sent:** Friday, July 29, 2011 12:25 PM
> **To:** Durch, Andy
> **Subject:** Tasks - Please approve Global Operating Standards, Metrics and Audits
>
> Task assigned by Burfein, John on 7/29/2011.
> Due by 8/5/2011
> Approval started by Burfein, John on 7/29/2011 12:25 PM
> Comment: Please review my edit to the Metrics section.
>
> To complete this task:
> 1. Review Global Operating Standards, Metrics and Audits.
> 2. Perform the specific activities required for this task.
> 3. Use the **Open this task** button to mark the task as completed. (If you cannot update this task, you might not have access to it.)

When the approval process begins, you receive a message indicating that the changes are under review. When the approval is complete, you receive a similar message notifying you that the changes have been published.

NOTE: If the changes are rejected instead of approved and published, you receive a message, but the fact that the changes were rejected is *not* listed in the subject of the message. The title of the message reads "Approval has completed" regardless of whether the changes were accepted or rejected. You must open the message to read comments from the reviewer and see whether the changes were approved. (See the text underlined in red, below.)

> **To:** Burfein, John
> **Subject:** Approval has completed on Environment, Health and Safety.
>
> ***Approval*** has completed on Environment, Health and Safety.
> Approval on Environment, Health and Safety has ended because Durch, Andy rejected the document.
>
> Approval started by Burfein, John on 7/29/2011 12:31 PM
> Comment:
>
> Rejected by Durch, Andy on 7/29/2011 12:32 PM
> Comment: This is where the user's rejection comments are shown.

OTHER FEATURES

The Service Excellence site includes many other features that the SharePoint platform provides. In general, only the features that are helpful in achieving the goals of the site are documented in this manual. However, features that site editors should be aware of are described here.

Editor Tools

The Editor Tools page includes a list of tasks that are assigned to you, downloadable copies of the *Service Excellence SharePoint Site User's Guide* and this manual, a calendar that gives a view of open tasks by date, and a table that lists the owners of each section of the site.

All Site Content

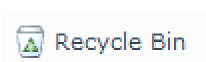
A link to All Site Content appears near the lower left corner of the page. Clicking this link takes you to a detailed list of all content on the site by type. Types of content include PDF files, Word documents, special reports, discussion boards, and lists of announcements, events, and tasks.

The All Site Content link can serve as a shortcut to access content and items that are difficult to navigate to using other methods. For example, you can read user feedback by clicking **All Site Content** and scrolling down the page to the Surveys section.

NOTE: Use caution when accessing All Site Content. Your editing privileges come with the potential to create havoc by accidentally deleting pages, documents, and other important material, some of which may not be recoverable.

The Recycle Bin

Site editors and administrators see a Recycle Bin link below the All Site Content link. SharePoint's Recycle Bin is similar to the Recycle Bin in Microsoft Windows. To see the contents of the Recycle Bin, click the link.



Because the Recycle Bin stores only deleted documents, list items, folders and files, nothing is sent to the Recycle Bin when you make changes to the text of a page. You can use the Recycle Bin only to recover items such as those listed on the All Site Content page.

The Recycle Bin empties its contents after 30 days. You cannot recover items after the Recycle Bin has emptied.