

SPO Members – Work Plan User Guide

Last revised: February 2021
Last reviewed: February 2021
Next review: February 2022

Ministry of SaskBuilds and Procurement

This document provides instructions and support for utilizing the many built in Work Plan storage and approval process available in SharePoint. These instructions support both the submitter and the approver.



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Adding Work Plan to SharePoint

- Navigate to your “Work Plans” library. Upload or drag your workplan document to the library.

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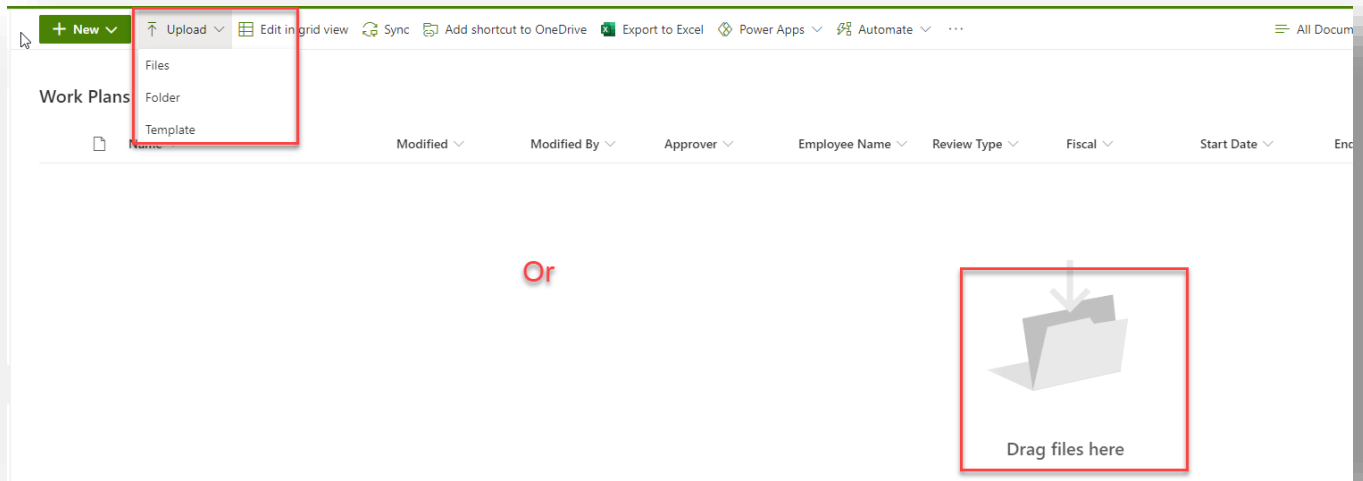
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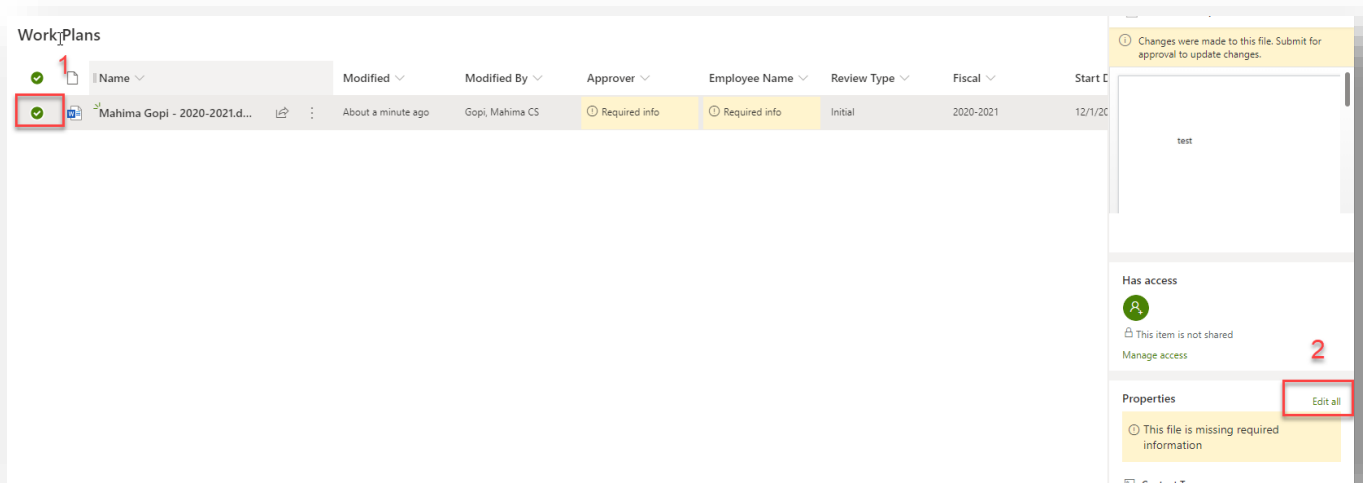
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- Click on “Edit all” on the bottom right (See image below).



- Enter “Employee Name” and “Approver”. Make sure that the default “Review Type” and “Fiscal” values are correct.

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Note: If you are uploading your first workplan for mid-year or final review then change the “**Review Type**” value accordingly.

The screenshot shows a SharePoint form for uploading a document. The form title is "Mahima Gopi - 2020-2021.docx". The form includes the following fields:

- Content Type:** Document
- Name:** Mahima Gopi - 2020-2021.docx
- Approver:** Enter a name or email address
- Employee Name:** Enter a name or email address
- Review Type:** Initial
- Fiscal:** 2020-2021
- Start Date:** 12/1/2020

At the bottom of the form, there are two buttons: "Save" and "Cancel".

- Click on “**Save**” to save changes.

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Save X Cancel Copy link Edit form X

Mahima Gopi - 2020-2021.docx

Content Type
Document

Name *
Mahima Gopi - 2020-2021.docx

Approver *
Gopi, Mahima CS X Enter a name or email address

Employee Name *
Gopi, Mahima CS X Enter a name or email address

Review Type *
Initial

Identify the stage of your work plan.

Fiscal *
2020-2021

Start Date *
12/1/2020

Save Cancel

Name	Modified	Modified By	Approver	Employee Name	Review Type	Fiscal	Start Date	End Date	Approval Status
Mahima Gopi - 2020-2021.docx	A few seconds ago	SharePoint Workflow Prod	Gopi, Mahima CS	Gopi, Mahima CS	Initial	2020-2021	12/1/2020		Draft

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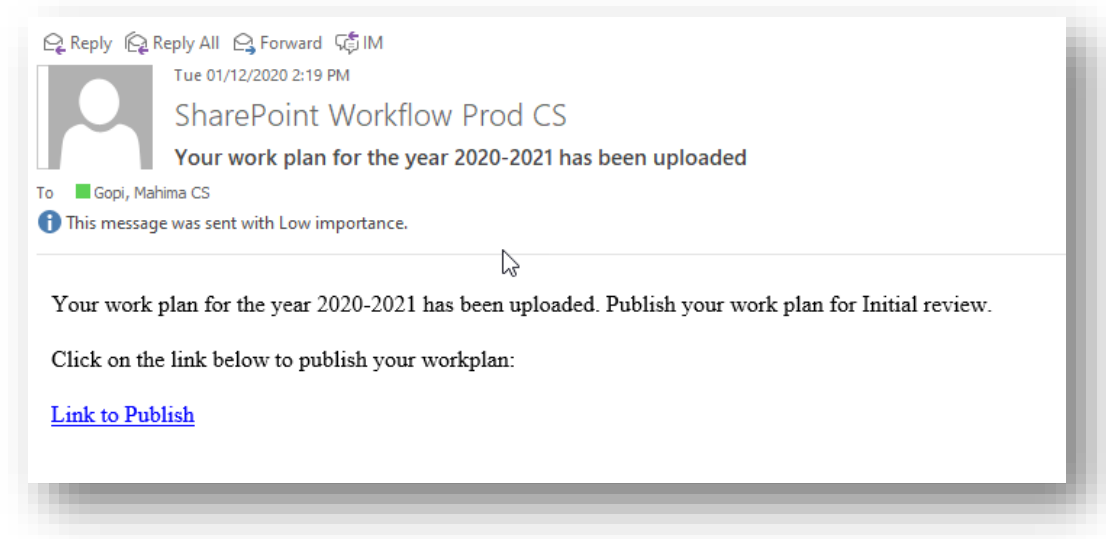
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Submitting for Approvals

Initial Approval

- After uploading your workplan, you will receive an email confirmation.



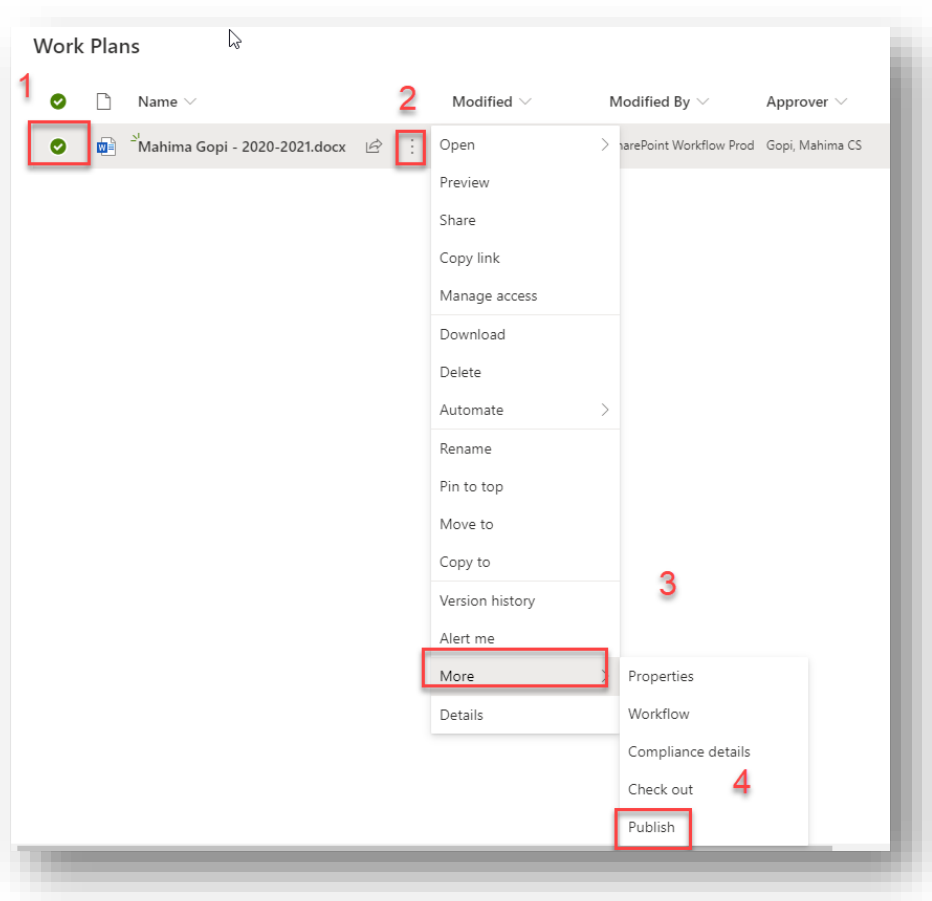
- Click on the link in email to navigate to your “Work Plan” library. Select your work plan document and click on “?” >> “More” >> “Publish”.

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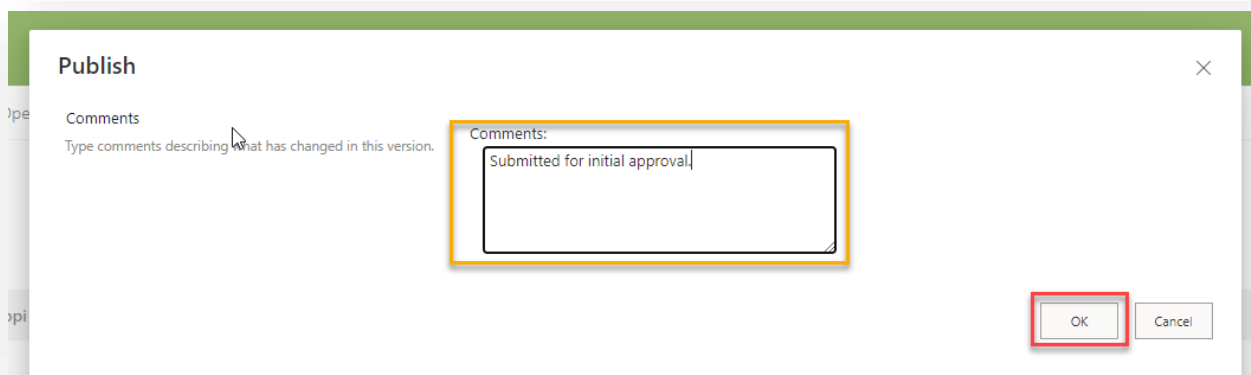
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- Type “Comments” (optional) and click on “OK” to publish.



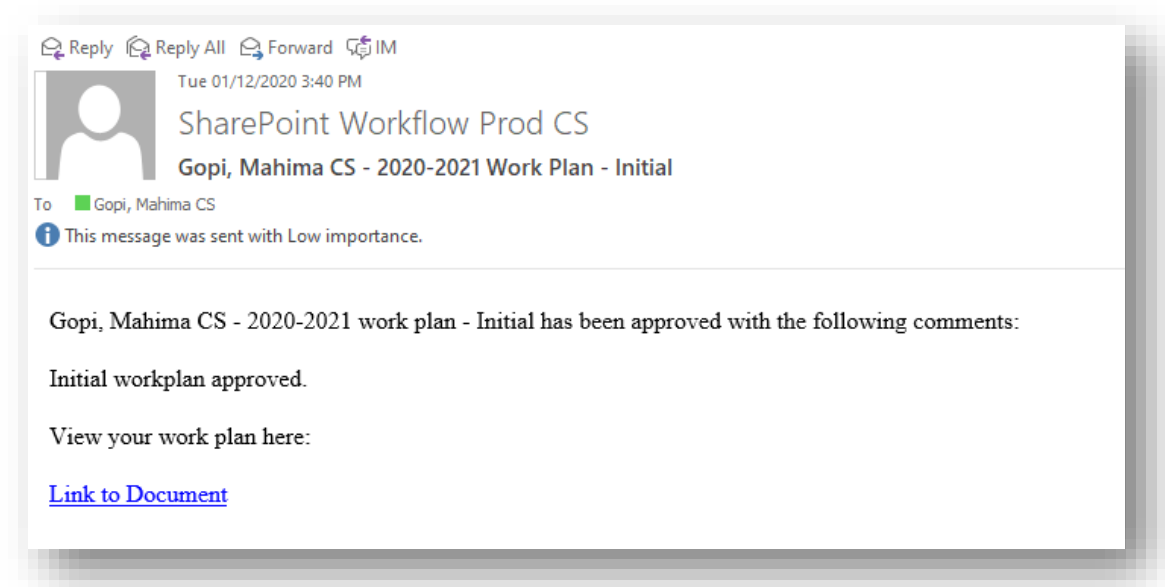
- You will receive email notification when your work plan is approved or rejected.

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Mid-term Approval

- If your work plan already exists on SharePoint, you can edit and save changes otherwise you can upload a new one ([2.0](#)).

Note: Your “Review Type” should be “Mid-Term”. If it is not “Mid-Term”, you can edit document properties and change that. [Section 2.0](#) explains how to edit document properties.

Work Plans					
Name	Modified	Modified By	Approver	Employee Name	Review Type
Mahima Gopi - 2020-2021.docx	A few seconds ago	Gopi, Mahima CS	Gopi, Mahima CS	Gopi, Mahima CS	Mid-Term

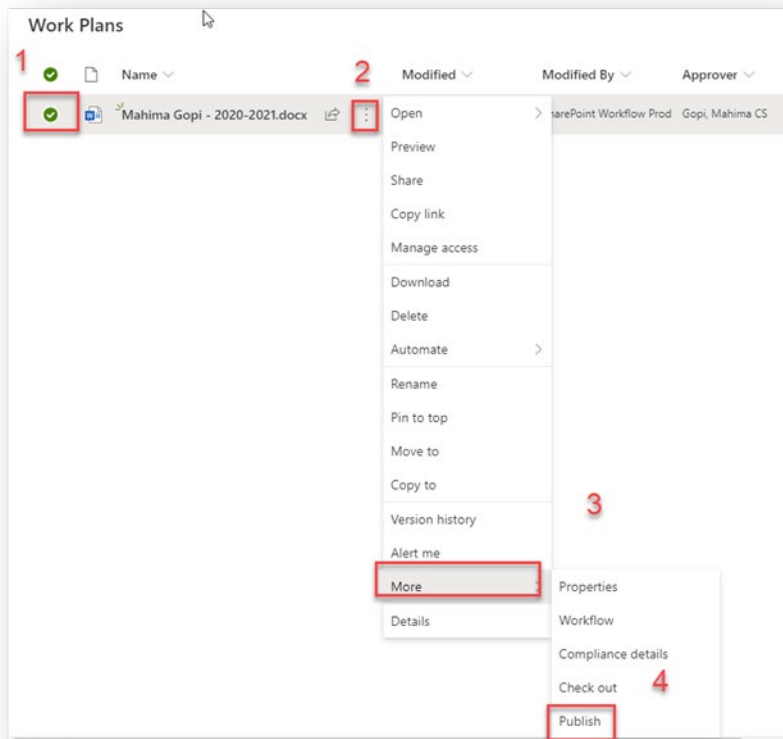
- Select your work plan document and click on “:” >> “More” >> “Publish”.

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- Type “Comments” (optional) and click on “OK” to publish.



- You will receive email notification when your work plan is approved or rejected.

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Final Approval

- If your work plan already exists on SharePoint, you can edit and save changes otherwise you can upload a new one (2.0).

Note: Your “Review Type” should be “Final”. If it is not “Final”, you can edit document properties and change that. [Section 2.0](#) explains how to edit document properties.

The screenshot shows a table titled 'Work Plans'. The table has several columns: 'Name', 'Modified', 'Modified By', 'Approver', 'Employee Name', and 'Review Type'. The 'Review Type' column is highlighted with a red box. The first row of data shows a document named 'Mahima Gopi - 2020-2021.docx' with a 'Review Type' of 'Final'.

Name	Modified	Modified By	Approver	Employee Name	Review Type
Mahima Gopi - 2020-2021.docx	A few seconds ago	SharePoint Workflow Prod	Gopi, Mahima CS	Gopi, Mahima CS	Final

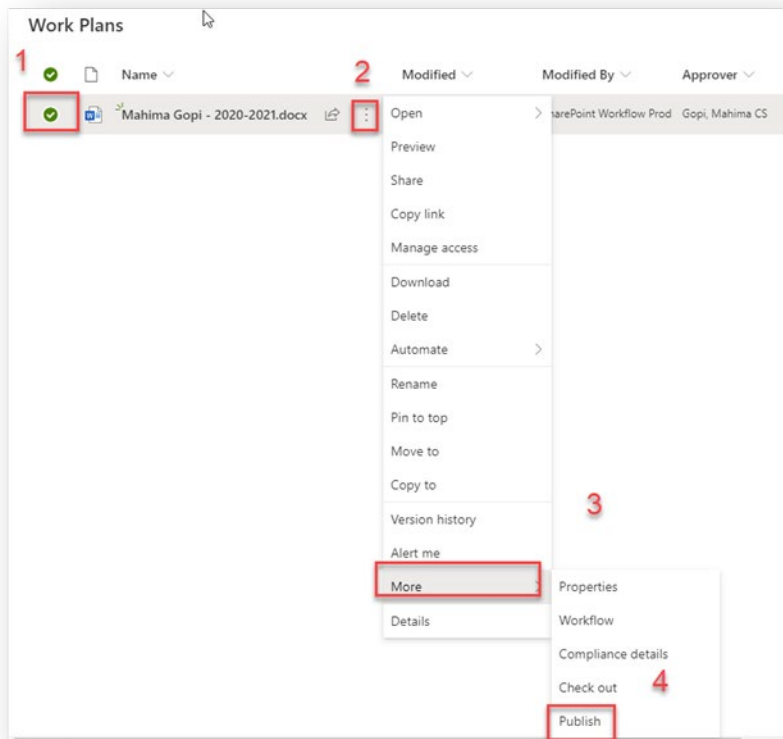
- Select your work plan document and click on “:” >> “More” >> “Publish”.

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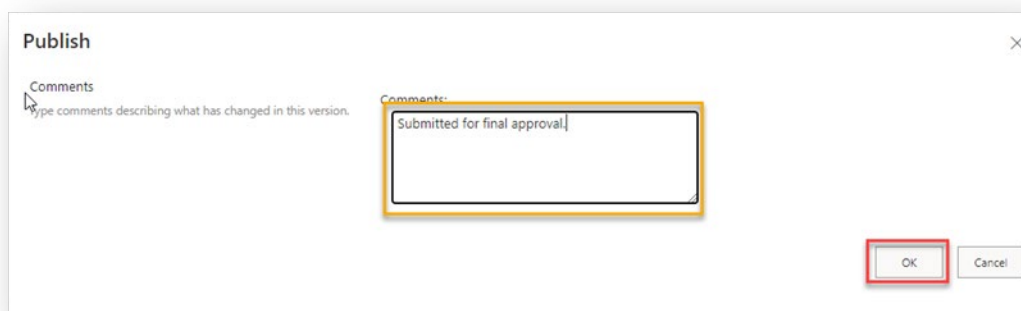
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- Type “Comments” (optional) and click on “OK” to publish.



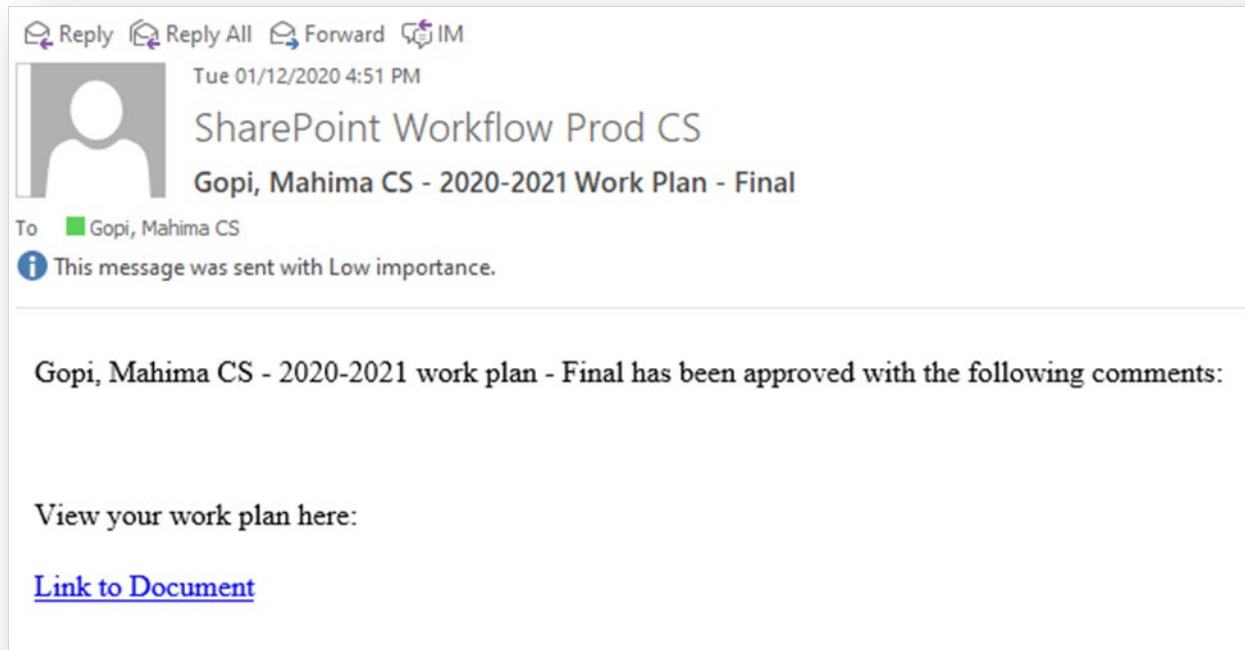
- You will receive email notification when your work plan is approved or rejected.

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Approving Work plans (For approvers only)

Approvers will receive email notification when employees publish their work plan document for approval.

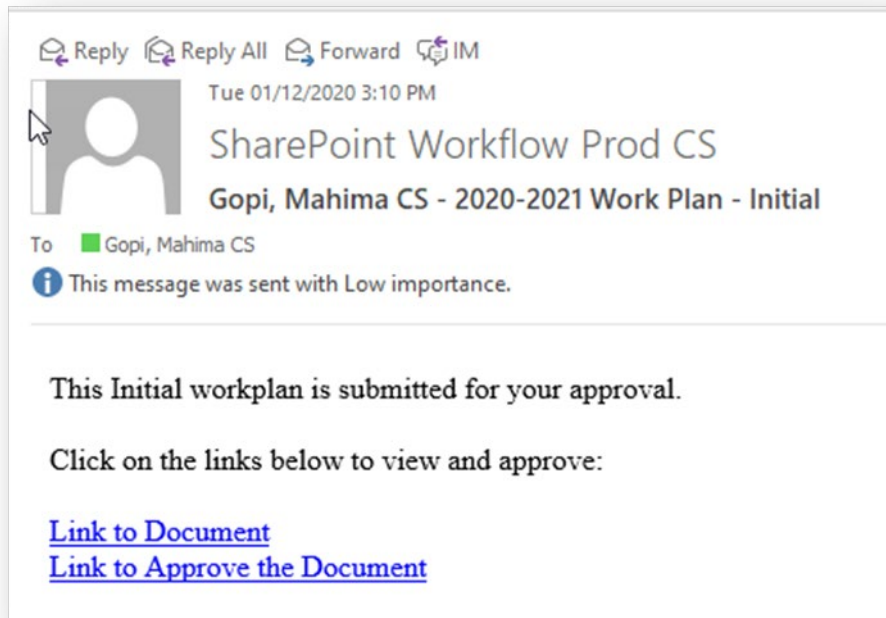
- Click on “[Link to Document](#)” in the email to review work plan document.

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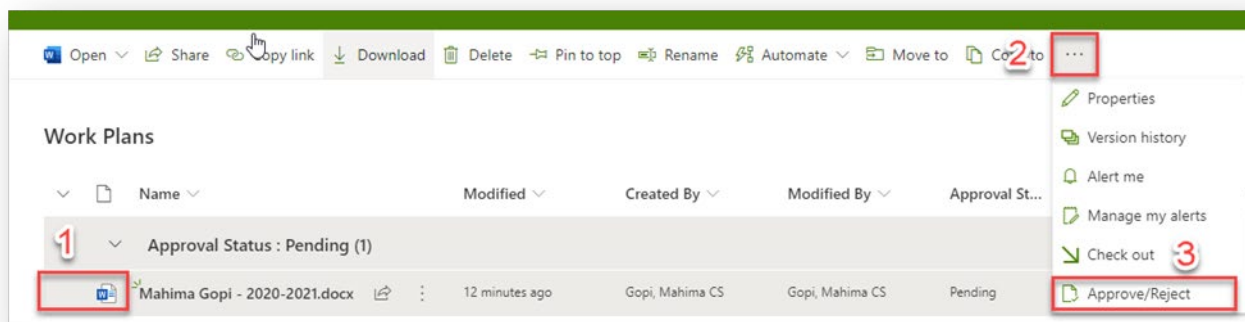
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Sample Email: Initial Approval Request

- Click on “[Link to Approve the Document](#)” in the email to approve or reject work plan. You can also go directly to the “Work Plans” library and select “**My Approvals**” view to see work plans pending your approval.
- Select the work plan you want to approve, click on “...” and then select “**Approve/Reject**”.



- Select “**Approve**” or “**Reject**”, type “**Comments**” (optional) and click on “**Ok**”.

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Approved/Reject Mahima Gopi - 2020-2021.docx

Approval status

- Approved** - This item will become visible to all users.
- Rejected** - This item will be returned to its creator and only be visible to its creator and all users who can see draft items.
- Pending** - This item will remain visible to its creator and all users who can see draft items.

Comment

Initial workplan approved.

Ok Cancel