

## Rule Routing during SPO Migration – October 7, 2024

This guide is for rule leads that will need to continue their rule review or routing process during the SPO migration of rule SP sites. Rule leads are being asked to move documents temporarily to a space on the GR OneDrive during migration and then move them back to SPO and delete the file after migration.

### Goals

- Allow rulemaking reviews and development continue without disruption during Sharepoint Online migration.
- Allow SPO migration happen without disruption.
- Manage rulemaking file and prevent unintentional consequences related to records.

### Things you will need

- Rulemaking documents in your current rulemaking site that need to be routed
- Microsoft Edge
- Access to the GR OneDrive folder created for your rule documents

### Before you begin

- Schedule time before October 7 to review these instructions and determine what documents you will need during migration.
  - **Steps 1-12 need to be completed no later than 5pm on October 6.**
- You will not be downloading all your documents; instead, only choose the documents that will need to be developed or reviewed during migration.
- Continue to work on the documents in OneDrive during migration, with a planned stopping point with your team once you are settled into your new SPO rule site.
- Contact Katie Wolt or Laurie Dumar in Governmental Relations if you have any questions. You can also refer to the [GR SPO Migration](#) Team or the [GR Migration SPO site](#) for more resources.

1. Navigate to your rulemaking Sharepoint site in the on-prem environment (this is your current rulemaking SP site).

The screenshot shows a web browser window displaying a SharePoint site. The address bar shows the URL: partnerweb/sites/GR1/rulemaking/23-03/\_layouts/15/start.aspx#/SitePages/Home.aspx. The page title is "AO# 23-03 Cannabis Lab Accreditation". The left sidebar contains navigation options: Home, Notebook, Documents, Pages, Recent, Rulemaking Documents, and Site contents. The main content area includes the Department of Ecology logo, a search bar, and a table with two rows: "Start with the prep views" and "Links for review and signature". The right sidebar contains sections for "Agency Rules Coordinator" (Wolt, Katie (ECY)), "Guidance", "BEST PRACTICES", "ECOMMENTS", and "WEB PAGE & PUBLIC COMMENT".

SharePoint

Not secure partnerweb/sites/GR1/rulemaking/23-03/\_layouts/15/start.aspx#/SitePages/Home.aspx

Wolt, Katie (ECY)

DEPARTMENT OF ECOLOGY State of Washington

AO# 23-03 Cannabis Lab Accreditation

Home

Notebook

Documents

Pages

Recent

Rulemaking Documents

Site contents

EDIT LINKS

ADA Accommodation: To request documents in an alternative format, please contact [Effie Bolinger](#).

### Rulemaking Process

You will begin by using the "prep" links to build your documentation for each phase of the process. When you are ready for final review and approval you will send the "packet" documents to the person that will be signing your code reviser forms.

<b>Start with the prep views:</b>	<ul style="list-style-type: none"><li><a href="#">Approval prep</a></li><li><a href="#">Announcement prep</a></li><li><a href="#">Proposal prep</a></li><li><a href="#">Adoption prep</a></li></ul>
<b>Links for review and signature:</b>	<ul style="list-style-type: none"><li><a href="#">Approval Packet</a></li><li><a href="#">Announcement Packet</a></li><li><a href="#">Proposal Packet</a></li><li><a href="#">Adoption Packet</a></li></ul>

Agency Rules Coordinator

Wolt, Katie (ECY)

### Guidance

**BEST PRACTICES**

Tips and tools for team meetings and rule files

[Process Summary Table](#)

[Public Outreach Best Practices](#)

**ECOMMENTS**

Set up your Ecomments

**WEB PAGE & PUBLIC COMMENT**

[Guidance](#)

[Rulemaking Public Input & Event Listing Setup Form](#)

2. Navigate to the rulemaking document library in your site. Click “Library Settings” under the library tab.

The screenshot shows a SharePoint interface with a browser address bar at the top displaying the URL: `partnerweb/sites/GR1/rulemaking/23-03/_layouts/15/start.aspx#/Rulemaking%20Documents/Forms/Sorted%20by%20ty...`. The SharePoint ribbon is visible, with the 'LIBRARY' tab selected. The ribbon includes sections for 'View Format', 'Manage Views', 'Tags and Notes', 'Share & Track', 'Connect & Export', 'Customize Library', and 'Settings'. The 'Library Settings' icon, which shows a gear and a folder, is circled in yellow. Below the ribbon, the main content area shows a list of document types under the heading 'Type of Document'. The list includes: 'Type of Document : (2)', 'Type of Document : A. Briefing Document (4)', 'Type of Document : B. Timeline (2)', 'Type of Document : C. Environmental Justice (3)', 'Type of Document : D. CR-Form (5)', 'Type of Document : E. Email Templates (4)', 'Type of Document : F. Tribal Letter (3)', 'Type of Document : G. Publication Template (3)', and 'Type of Document : H. Other (35)'. A left-hand navigation pane shows 'Rulemaking Documents' as the active library.

3. Under Library Settings, click “Manage files that have no checked in version.” We want to make sure that there are no checked-out versions of your rulemaking documents in your library before migration begins on October 7.

The screenshot shows a SharePoint interface for a document library named "Rulemaking Documents". The page title is "Rulemaking Documents - Settings". The breadcrumb path is "AO# 23-03 Cannabis Lab Accreditation" with an "EDIT LINKS" option. The page is divided into several sections:

- List Information:** Name: Rulemaking Documents; Web Address: http://partnerweb/sites/GR1/rulemaking/23-03/Rulemaking Documents/Forms/Sorted by type.aspx; Description: (empty).
- General Settings:** A list of settings including "List name, description and navigation", "Versioning settings", "Advanced settings", "Validation settings", "Column default value settings", "Audience targeting settings", "Rating settings", and "Form settings".
- Permissions and Management:** A list of actions including "Delete this document library", "Save document library as template", "Permissions for this document library", "Manage files which have no checked in version" (highlighted in yellow), "Workflow Settings", "Generate file plan report", "Enterprise Metadata and Keywords Settings", and "Information management policy settings".
- Communications:** A list of settings including "Incoming e-mail settings".
- Columns:** A section stating "A column stores information about each document in the document library. The following columns are currently available in this document library:" followed by a table with columns for "Column (click to edit)", "Type", and "Required".

The left sidebar contains navigation options: Home, Notebook, Documents, Pages, Recent, Rulemaking Documents, Site contents, and EDIT LINKS. The top navigation bar shows "SharePoint" and the user "Wolt, Katie (ECY)".

4. If you don't have any files listed, you can move ahead with the next steps. If you do have files checked out, please check them back in. If you have any trouble checking the documents back in, please contact Katie via Teams chat and she can do it for you.

Not secure partnerweb/sites/GR1/rulemaking/23-03/\_layouts/15/ManageCheckedOutFiles.aspx?List=%7B4443E001-A8D5-4A77-8348-A2DB...

SharePoint Wolt, Katie (ECY)

DEPARTMENT OF ECOLOGY State of Washington

AO# 23-03 Cannabis Lab Accreditation EDIT LINKS

## Settings > Checked Out Files ⓘ

Take Ownership of Selection

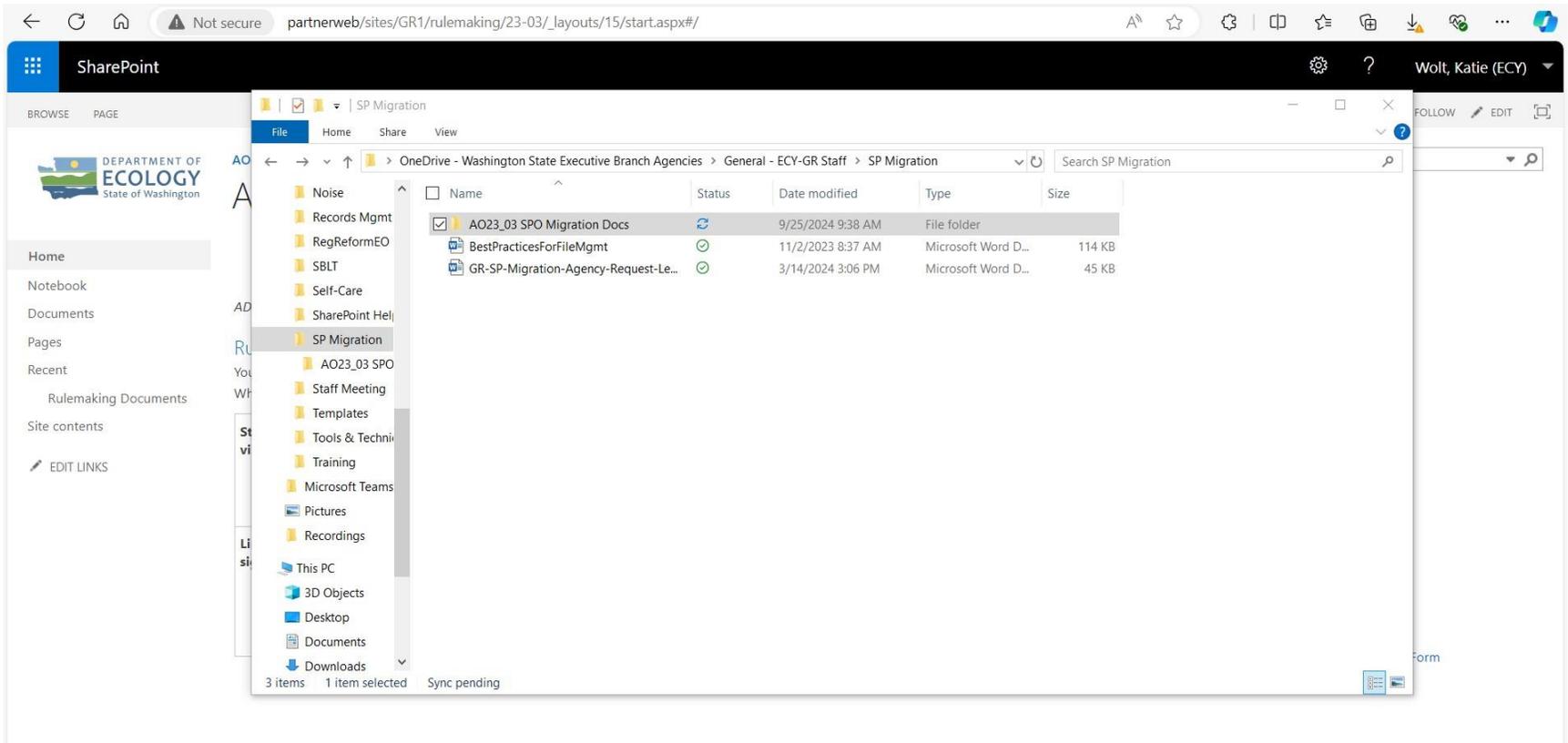
Type	Name	Location	Checked Out To	Modified	Size
All files currently have a checked in version.					

Home

- Notebook
- Documents
- Pages
- Recent
  - Rulemaking Documents
- Site contents

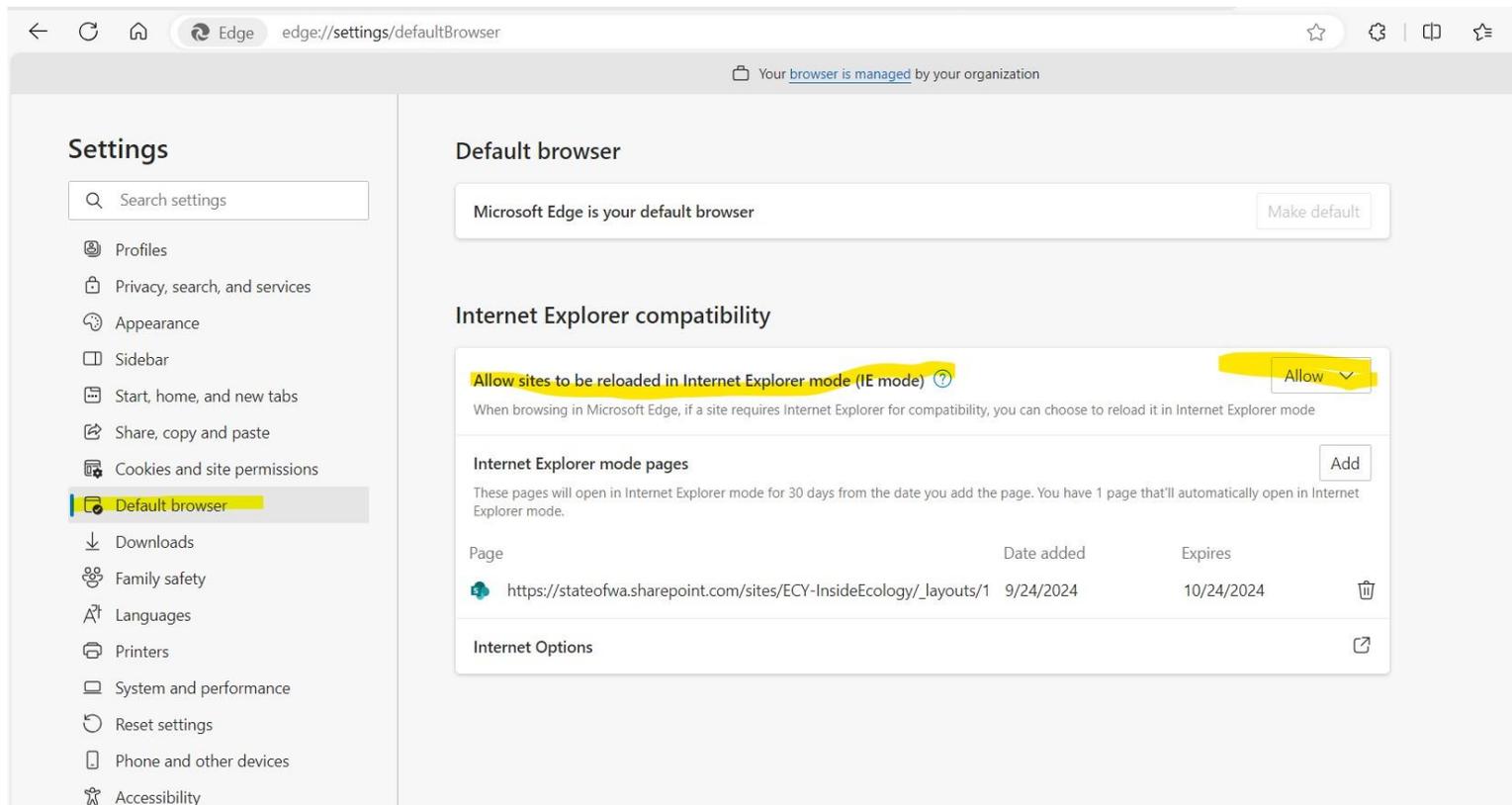
EDIT LINKS

5. Next, you will need to make sure you have access to the GR SPO Migration folder that has been created for you. Open your file explorer and navigate to [OneDrive - Washington State Executive Branch Agencies\General - ECY-GR Staff\SP Migration](#). You should see a folder that has the AO number associated with your rulemaking. This is where you will be adding your documents.



- Return to your rulemaking document library in your Microsoft Edge browser. In order to move your documents, you will need to make sure the Microsoft Explorer feature is turned on in your browser.

Click the three dots in the top right corner of your browser and click “Settings.” Inside Settings, click the “Default Browser” category. Turn on “Allow” under “Allow sites to be reloaded in Internet Explorer mode (IE mode).”



7. Go back to your browser and make sure that it is in Explorer mode. If you don't see the information highlighted at the top of your browser, close the browser and open it again.

Not secure | partnerweb/sites/GR1/rulemaking/23-03/\_layouts/15/start.aspx#/Rulemaking%20Documents/Forms/Announcement%20Packet.a...  
You're in Internet Explorer mode. Most pages work better in Microsoft Edge. [Open in Microsoft Edge](#) [Show in toolbar](#) [Learn more](#)

SharePoint Wolt, Katie (ECY)

BROWSE CUSTOM COMMANDS FILES LIBRARY SHARE FOLLOW

DEPARTMENT OF ECOLOGY State of Washington

AO# 23-03 Cannabis Lab Accreditation EDIT LINKS

Search this site

Home New Upload Sync Share More

Notebook

Documents

Pages

Recent

Rulemaking Documents

Site contents

EDIT LINKS

Sorted by type Adoption Packet **Announcement Packet** Find a file

Name	Checked Out To	Check In Comment
CannabisAccreditationCommsPlan	...	
CR 101 WAC Track Chapter 173-55 WAC	...	
CR-101	...	
D2BriefingDocument	...	
Notice to interested parties_CR-101	...	
Timeline	...	
Timeline_Withdrawal	...	
TribalLetter-CR-101 rev.12_2021	...	added PM signature. -erz 230616
WSR 23-13-116	...	uploaded by erz 230621

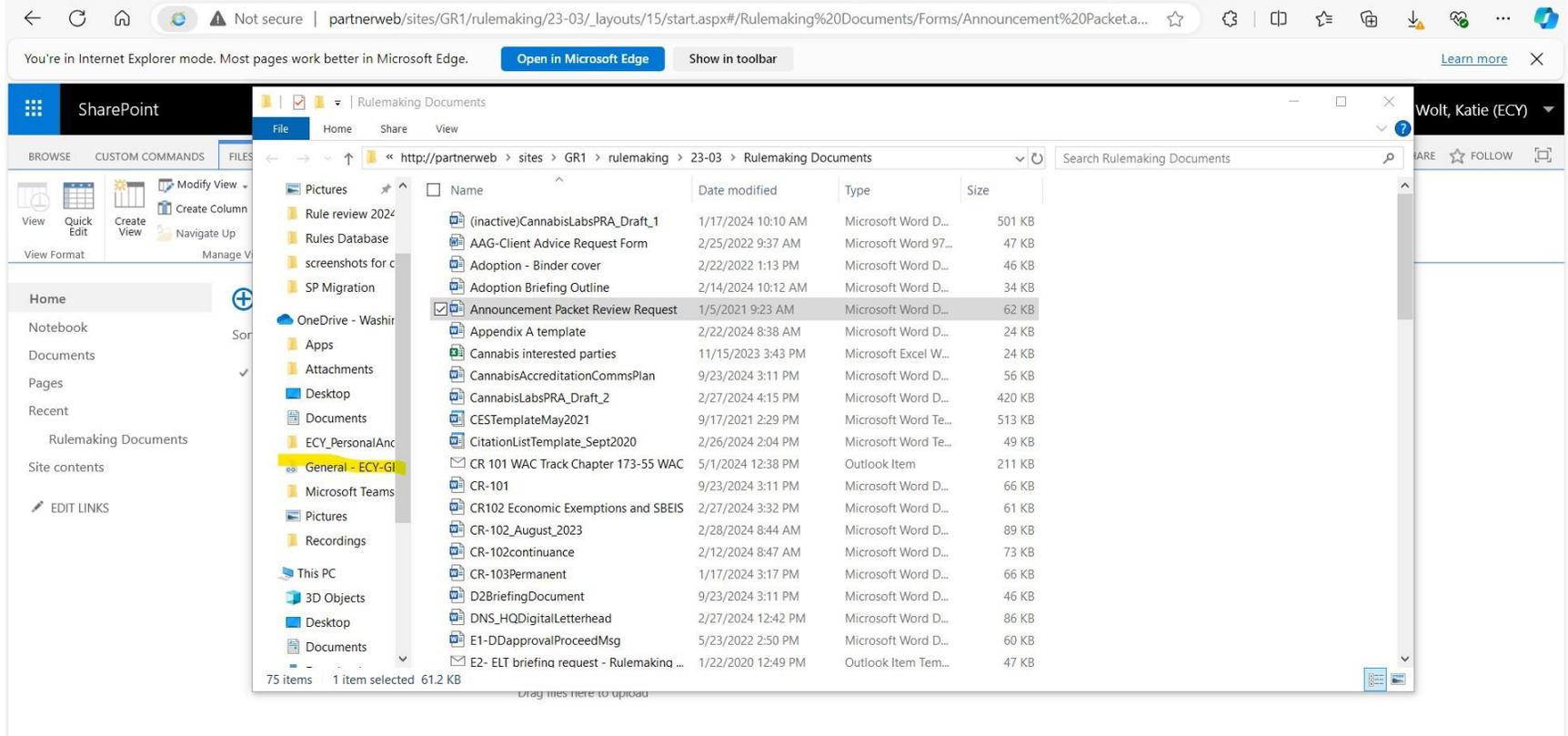
Drag files here to upload

8. Open the “Library” tab on your rulemaking document library. Click “Open with Explorer.”

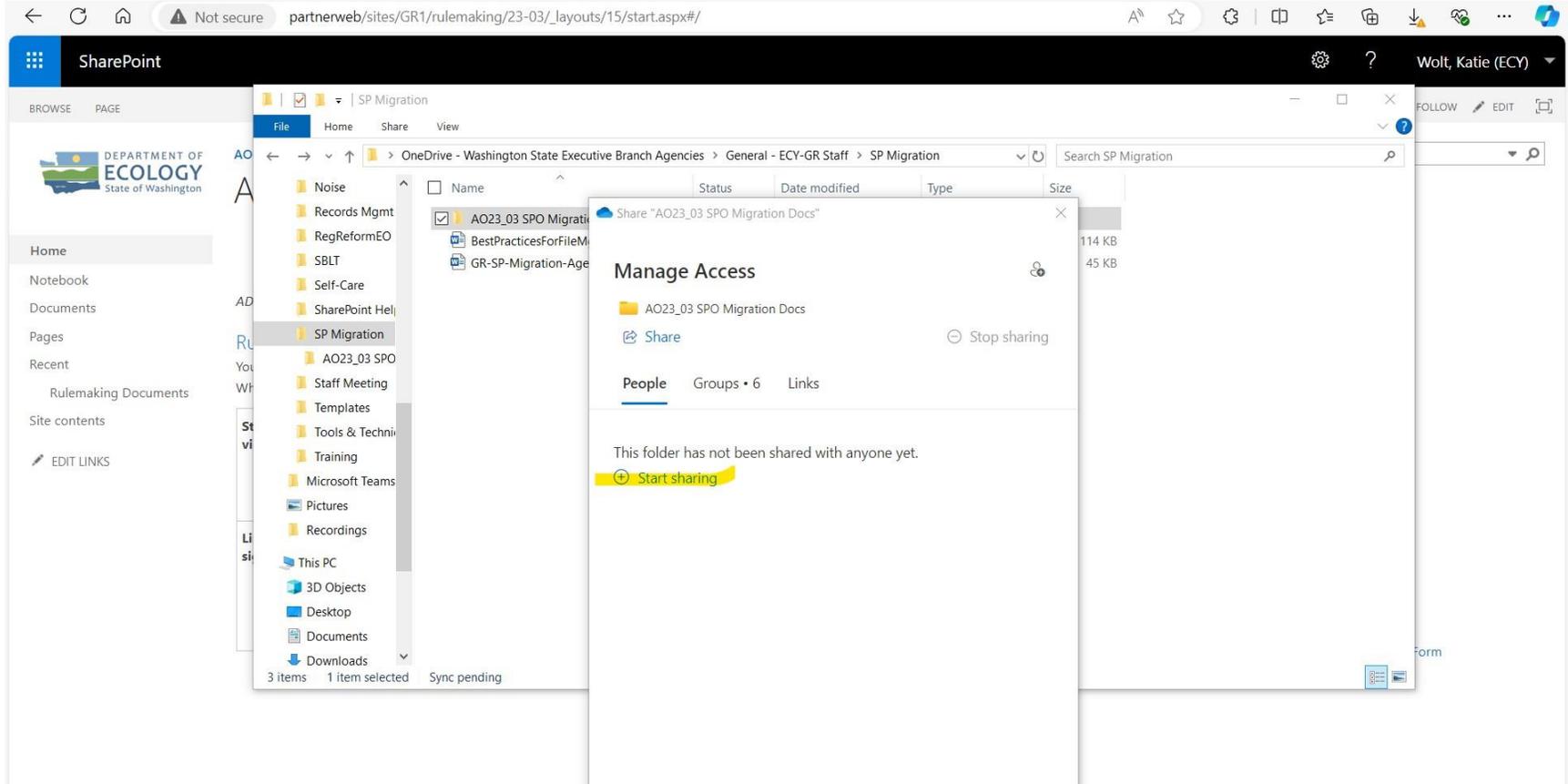
The screenshot shows a SharePoint document library in Internet Explorer. The browser address bar shows the URL: `partnerweb/sites/GR1/rulemaking/23-03/_layouts/15/start.aspx#/Rulemaking%20Documents/Forms/Announcement%20Packet.a...`. The SharePoint interface includes a top navigation bar with the 'LIBRARY' tab selected. Below the navigation bar is a ribbon with various options, including 'Open with Explorer' which is highlighted in yellow. The main content area shows a list of documents in a table format.

Name	Checked Out To	Check In Comment
CannabisAccreditationCommsPlan	...	
CR 101 WAC Track Chapter 173-55 WAC	...	
CR-101	...	
D2BriefingDocument	...	
Notice to interested parties_CR-101	...	
Timeline	...	
Timeline_Withdrawal	...	
TribalLetter-CR-101 rev.12_2021	...	added PM signature. -erz 230616
WSR 23-13-116	...	uploaded by erz 230621

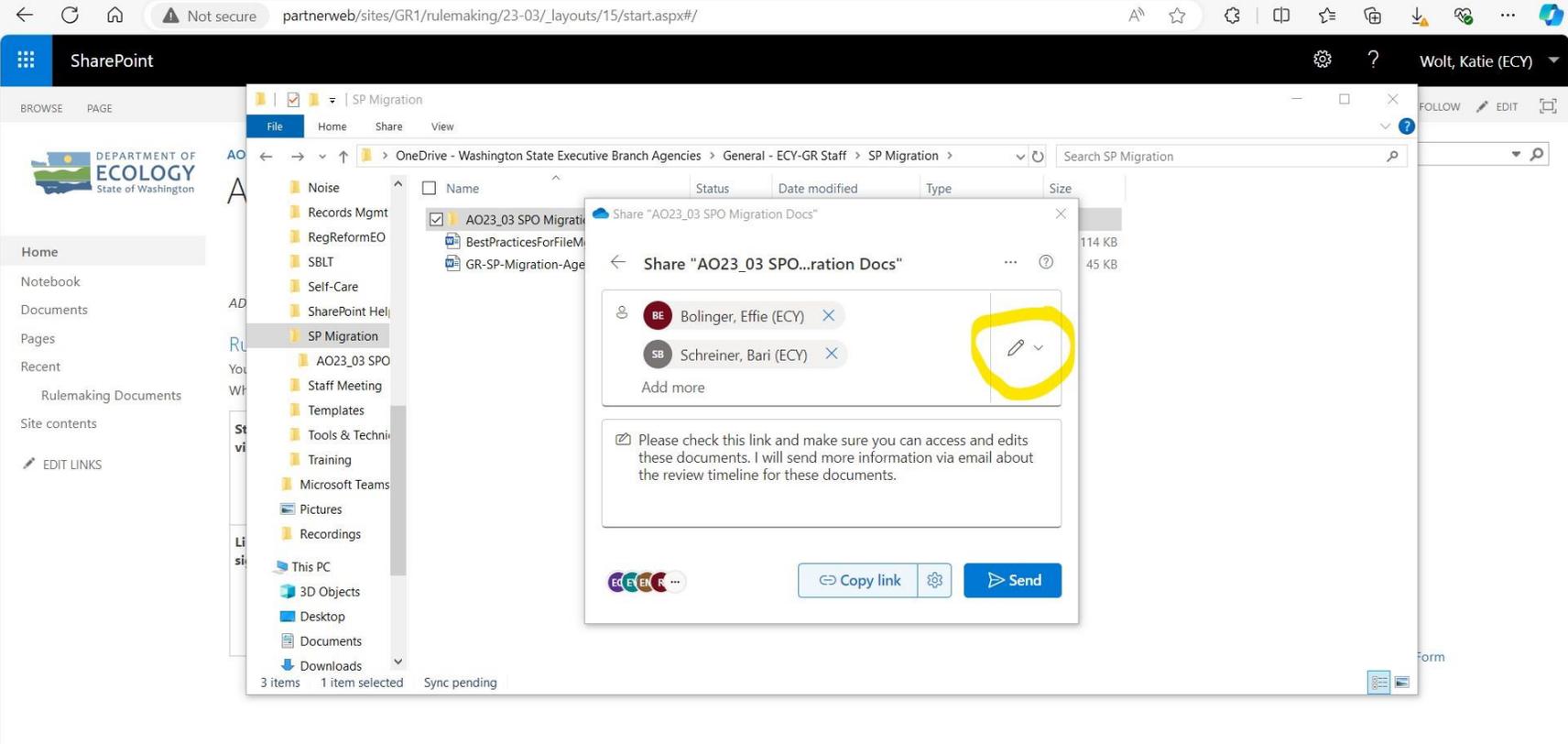
9. The document library will open up in the File Explorer. You will need to identify any documents that you need reviewed or routed during SPO migration. The views from your Sharepoint site will not be available in the File Explorer. Move these files to the designated folder in the GR OneDrive.



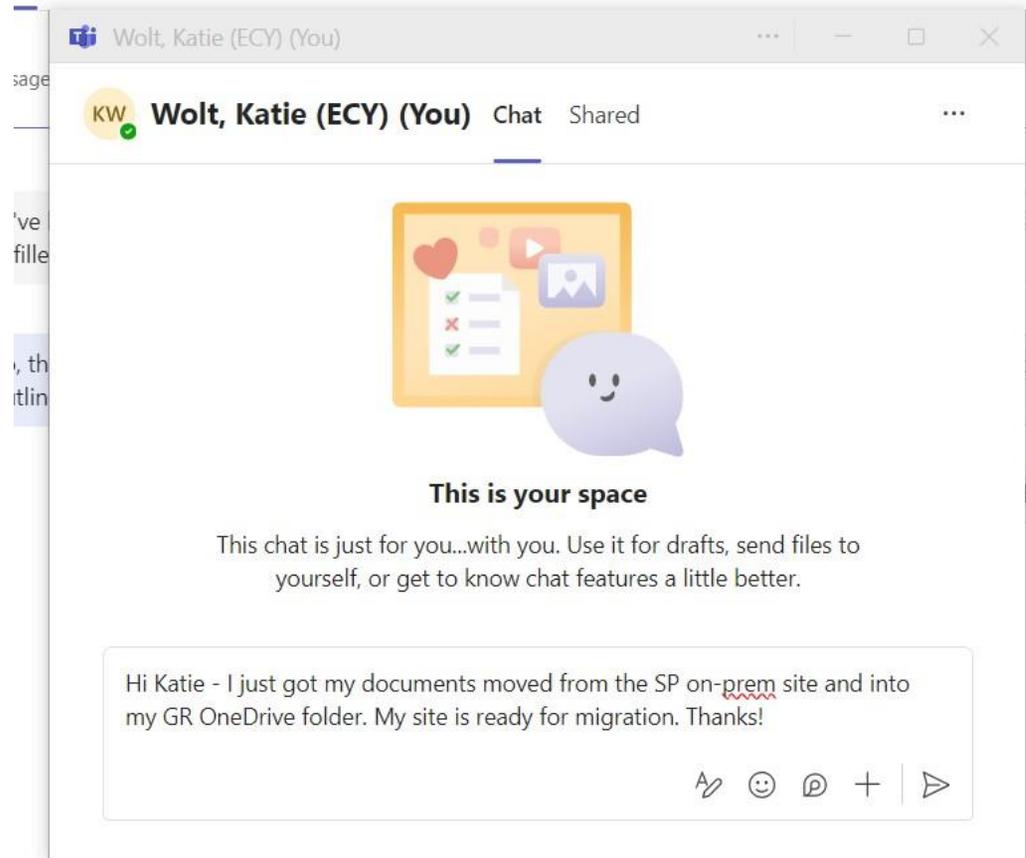
10. Once you have moved over the documents you need, you will need to check the permissions for your team that will be working on the documents. Navigate to the folder in OneDrive and right click the folder to choose “Manage Access.” You should see the following box pop up on your screen. Click “Start Sharing.”



11. Choose the members of your team that you want to have access to the folder. Make sure that they have edit permissions by changing the permissions on pencil button to the right of their name. Write a message that will accompany the link asking them to check their access and to let you know if they can't open or edit the documents.



12. Once your documents have been moved over to your OneDrive folder, please send Katie a chat or an email to update the status of your site. **Please do this no later than 5pm on October 6, 2024.**



13. Now your team is ready to work in the OneDrive folder during migration. Please continue to route and share your documents as you would in Sharepoint while migration is happening.

Once your new SPO rule site has been published, you will be able to reupload your OneDrive documents into your SPO rule document library. Once that is complete, send an email to Katie asking her to delete your OneDrive folder. This should close the loop on the rule file.

