

Getting Started with UB SharePoint Team Sites

A SharePoint site offers tools and workspace you can use to communicate with team members, track projects, coordinate deadlines, and collaboratively create and edit documents. This document addresses:

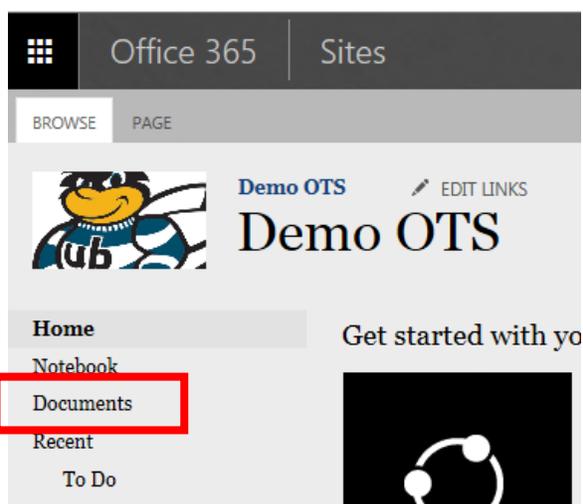
- Adding Files to your Team Site
- File Versioning in Team Sites
- Versioning and Content Approval
- Document Check Out

Adding Files to your Team Site

You can upload files, such as Word documents, PDF files, or JPG photos as single individual files or in multiples by using the Drag & Drop feature.

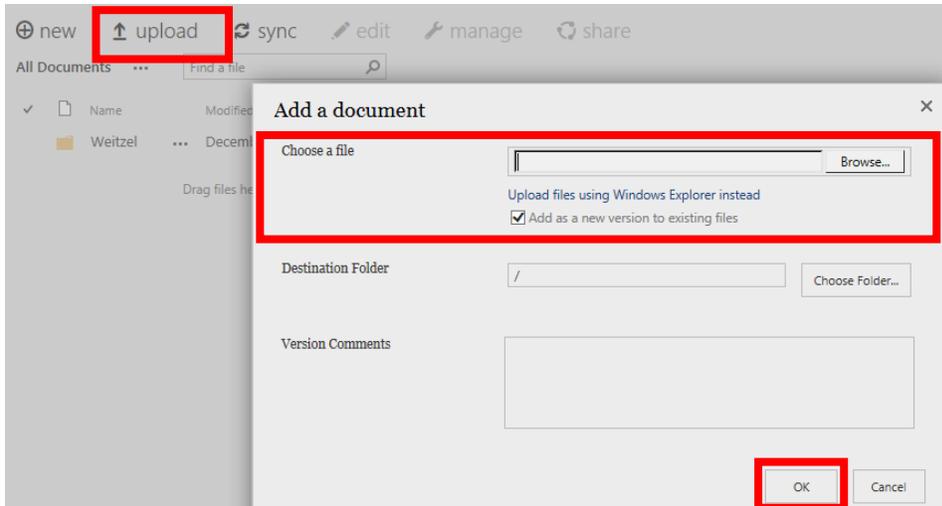
UPLOAD FUNCTION

1. On your Team Site click **Documents**.



2. Click **upload**.
3. In the *Add a document* window, click **Browse** to choose a file.
4. If you want this file to be added as a new version of an existing file, select **Add a new version to existing file**.

5. Choose a **Destination Folder** if one exists, or leave blank.

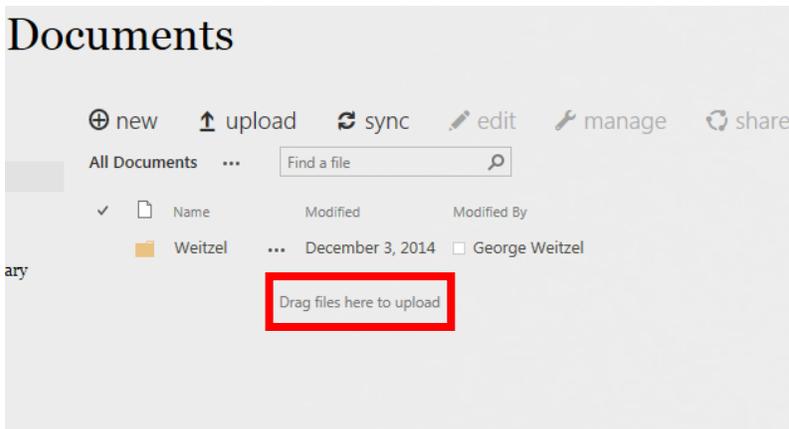


6. If applicable, enter **Version Comments**.
7. Click **OK**.

DRAG AND DROP FUNCTION

You can upload files to your Team Site by dragging them from your computer and dropping them into the Team Site. This is the easiest way to upload a documents and files.

1. Click **Documents** in your Team Site.



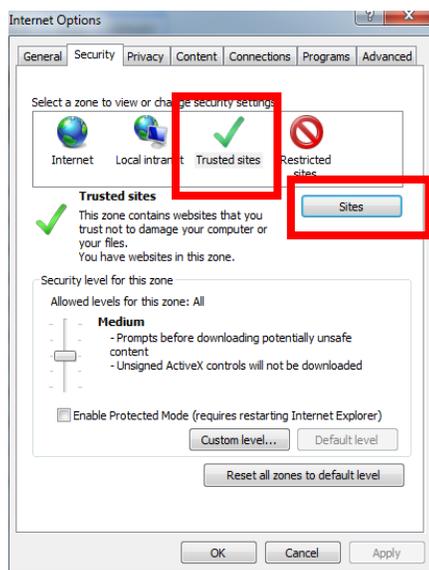
2. On your computer find the files that you want to upload and drag them to the space in the library where it says **Drag files here to upload**.

NOTE: If you run into problems using this option, it may be related to the Web browser you're using. You may need to add the SharePoint Team Site as a trusted site in your browser settings.

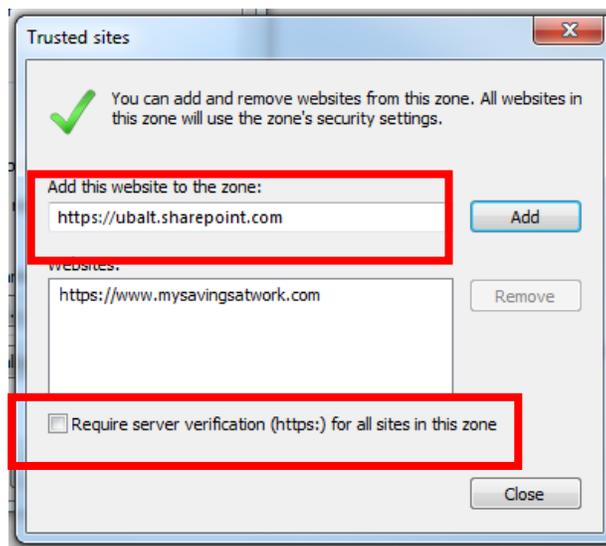
To add this as a trusted site in Internet Explorer:

1. On the menu bar, click **Tools**.
2. Click **Internet Options**.

3. Click on the **Security** tab
4. Click the **Trusted sites** zone, then click the **Sites** button.



5. In the *Trusted sites* window, enter <https://ubalt.sharepoint.com> in the top box.
6. **Uncheck** *Require server verification (https:) for all sites in this zone*, then click **Add**.



7. Click **Close**.

File Versioning in Team Sites

Versioning allows users to track a file's history and to see other versions of the same file without altering the original. When versioning is enabled, you can see when an item or file was changed and who changed it, including their comments. You can also see when properties (information about the file) were changed.

Versioning is especially helpful when several people work together on projects, or when a file goes through several stages of development and review.

Versioning can be used to:

- **Record a version history.** You see when an item or file was changed and who changed it. You can see when properties or information about the file were changed. For example, if someone changes the due date of a list item, that information appears in the version history. For files, you also see comments that people include about their changes.
- **Restore a previous version.** If you made a mistake in a current version, if the current version is corrupt, or if you simply prefer a previous version, you can replace the current version with a previous one. The restored version becomes the new current version.
- **View a previous version.** You can view a previous version without overwriting your current version. If you are viewing version history within a Microsoft Office document, such as a Word or Excel file, you can compare the two versions to determine what the differences are.
- **Delete a previous version.** You can choose to delete a single version of a file — for example, if you know that you made a mistake in that version — which removes that version from the version history. However, if you delete the actual file, all of its versions are deleted with it. By default, when you delete a version, the version is sent to the Recycle Bin, where it can be recovered until it is permanently deleted.

When Versions Are Created

When versioning is enabled on a document library, versions are created in the following situations:

- When a list item or file is first created or when a file is uploaded.

Note: If file check-out is required, the file must first be checked in, in order to create its first version.

- When a file is uploaded that has the same name as an existing file and the **Add as a new version to existing files** check box is selected.
- When the properties of a list item or file are changed.
- When a file is opened, edited, and saved. A version is created when you first click **Save**. This version is updated with the latest changes that you make to the file before closing it.

Note: A version is not created every time that you or another user clicks **Save**, because this would create too many versions.

- When a checked out file is changed then checked back in.

Note: If you or another user discards the checked-out version, no version is created.

Major or Minor Version Tracking

Versioning provides the option to track minor or major versions, or both. A **major version** is considered one ready for a large group review, such as being distributed for review by all team members or to a people outside of the team. A **minor version** is analogous to a draft or a work in progress.

Here are some guidelines on selecting the appropriate versioning.

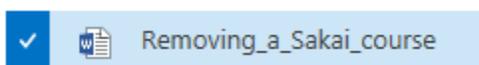
- **Simple versioning** tracks only major versions. This may be appropriate if a small group of people are working on the same file or if it's not expected to undergo many revisions.
- **Tracking major and minor versions** is helpful when many people are working on the same files and likely creating notably different changes to the file. This option provides team members access to all file versions and is a complete history of the file.

Some options available when you are tracking both versions are:

- **Designating a Version as Major.** By default, a version is stored as minor. To designate a version as major, you must publish the file. You can publish the file by using drop-down commands in a library.
- **Overwriting a Minor Version.** If you need to overwrite a minor version because of an error, you can overwrite the version assuming you have permissions to delete files.
- **Convert a Major Version to Minor.** If you publish a major version and realize that you made a mistake, you can turn the version into a minor version again by un-publishing it.

VIEW THE VERSION HISTORY OF A FILE

1. Click on **Documents** to access the documents library.
2. Select a file by clicking on the **checkmark** next to the file.



3. On the menu bar, click **Files**, then **Version History**.

Version Numbering

As you create or upload files, versions are numbered. When you view a version history, the versioning type determines the numbers assigned to the versions:

- With **simple versioning** enabled, the versions will be whole numbers only, with 1 being the first version that you create or upload, and will continue in sequence with each new version.
- With **major and minor versioning** enabled, major versions are whole numbers, and minor versions are decimals. For example, 0.1 is the first minor version of a file, 1.3 is the third minor version of a file that was published once, and 2.0 is the second major version of a published file.

No. ↓	Modified	Modified By	Comments
This is the current published major version			
2.0	5/15/2009	Nina Vietzen	Legal Review
1.3	5/14/2009 Due date	Vanessa Garcia 6/9/2006	changed due date
1.2	5/13/2009	Mike Miller	Updated figures
1.1	5/11/2009	Vanessa Garcia	Fixed some typos
1.0	5/10/2009	Dave Natsuhara	ready for first review
0.2	5/10/2009	Mike Miller	Inserted chart
0.1	5/10/2009	Dave Natsuhara	added sales data

The highlighted file is the current published major version. A major version is indicated by a whole number.

Document Check Out

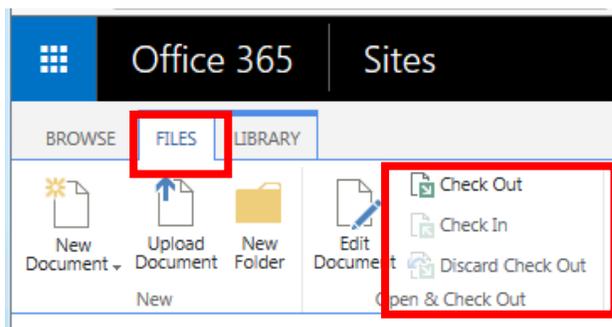
You can use Check Out to make changes to a file while locking others out from editing the file. During a check out, you can edit it online or offline, and save it.

When you check out a file, a version is created when you check the file in. When check-out is not required, a version is created when the file is first saved, and this version is updated when you close it. If you open and save the file again, another version is created.

When check-out is required, you cannot **add a file, change a file, or change the file's properties without first checking out the file**. When you check in the file, you are prompted to provide comments about the changes that you made, which helps to create a more meaningful version history.

TO CHECK OUT, CHECK IN OR DISCARD CHANGES

1. Click on **Documents** to access the documents library.
2. Click on the **checkmark** to select the file.
3. Click on **Files** from the menu bar, then **Check Out/Check In/Discard Check Out**.



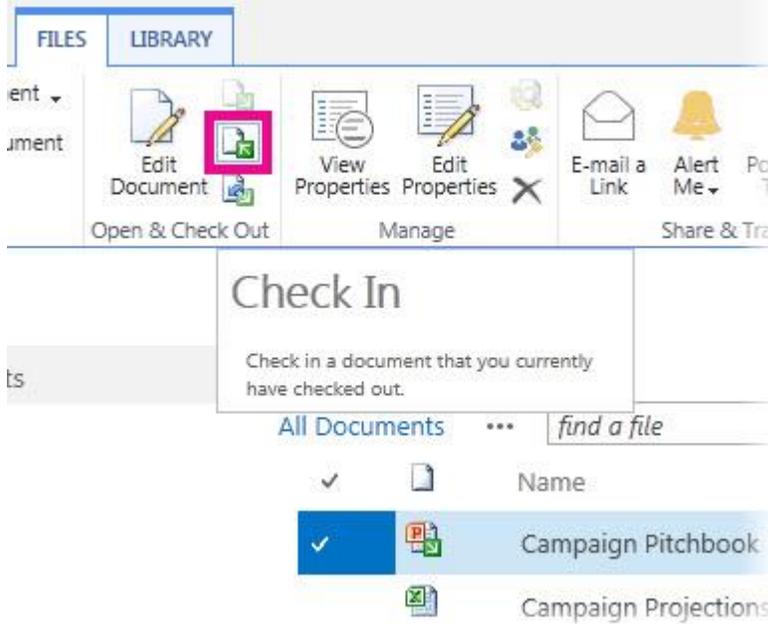
Tip: To edit an Office document at the same time as other people—also called co-authoring—don't check out the document; open it in Word online and edit it. It is recommended to turn on versioning for the library first in case someone makes a mistake later and you need to restore an earlier version of the document.

CHECK IN FILES

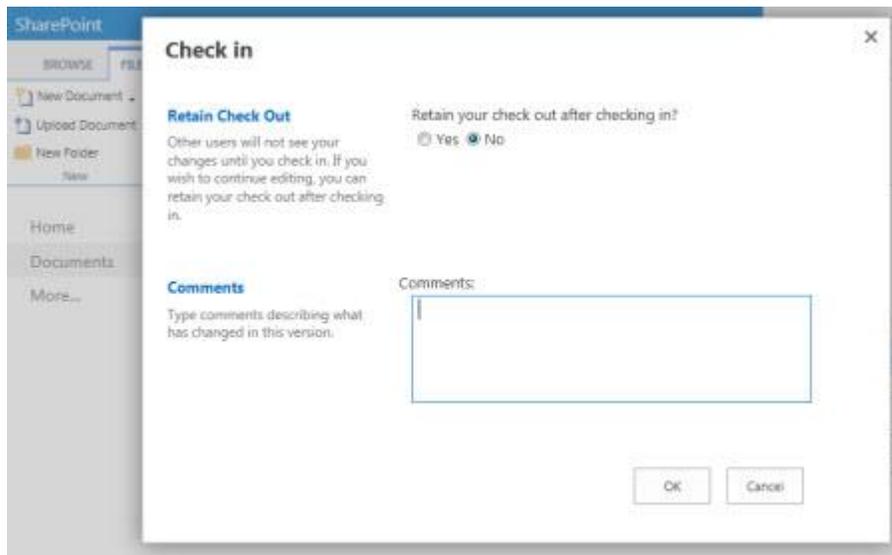
Your files, and any changes you make to them, will not be available to your colleagues until you check the files back into your library.

1. Go to the library where your file is saved. (If you're looking at a view of the library on another page, you may have to click the title of the library first. For example, you may have to click **Documents** first to go to the **Documents** library.)

2. Select the file, or files, that you want to check in, and then click **Files > Check In**.



3. If you want to do an interim check-in so you can continue working on the file, select **Yes** in the **Retain Check Out** area. Otherwise, leave **No** selected.



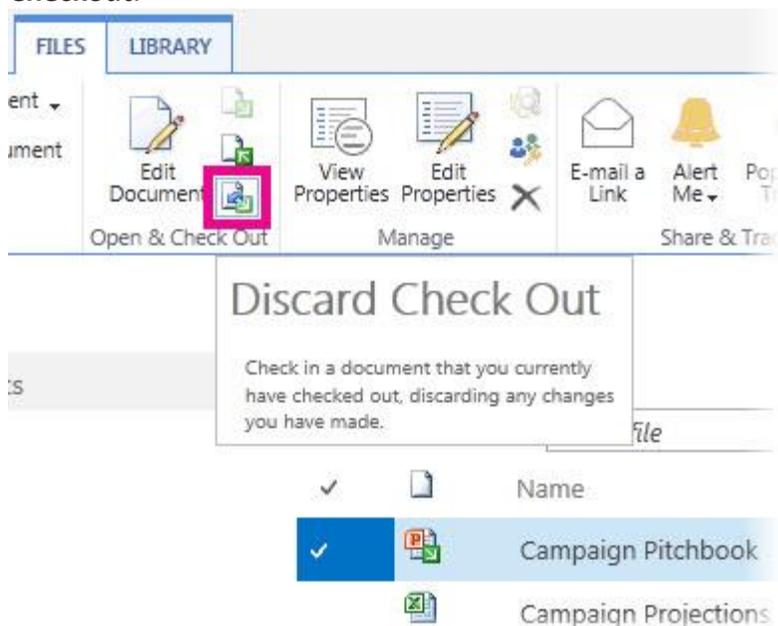
4. In the **Comments** area, add a comment that describes the changes. This step is optional but recommended as a best practice. Check-in comments are helpful when several people work on a file. If versions are being tracked, the comment becomes part of the version history, which may be important to you if you need to restore to an earlier version of the file.
5. Click **OK**. The green arrow disappears from the file icon when the file is checked back in.

DISCARD A CHECK-OUT

If you check out a file and don't make changes to it, or you make changes that you don't want to keep, you can simply discard the checkout, rather than saving the file. A new version is created each time you

check a file back into the library. By discarding the checkout, you can avoid making new versions when you haven't made any changes to the file.

1. Go to the library where your file is saved. (If you're looking at a view of the library on another page, you may have to click the title of the library first. For example, you may have to click **Documents** first to go to the **Documents** library.)
2. Select the file, or files, that you want to discard changes for, and then click **Files > Discard Checkout**.



3. Click **OK** to finish discarding the checkout. The green arrow disappears from the file icon when the file is checked back in.