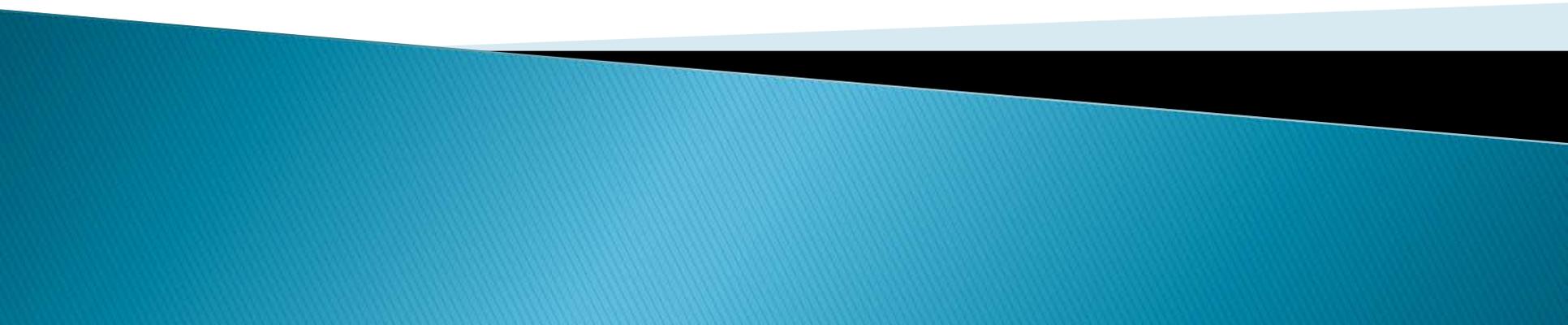


Working with Documents and Version Control

SharePoint 2010



Introduction

- ▶ SharePoint is a flexible tool and provides many methods or techniques to manage document control.
- ▶ This procedures considers current bandwidth issues and security restrictions our customers may face.
- ▶ This procedures was designed to provide the safest way to share documents and maintain version control.

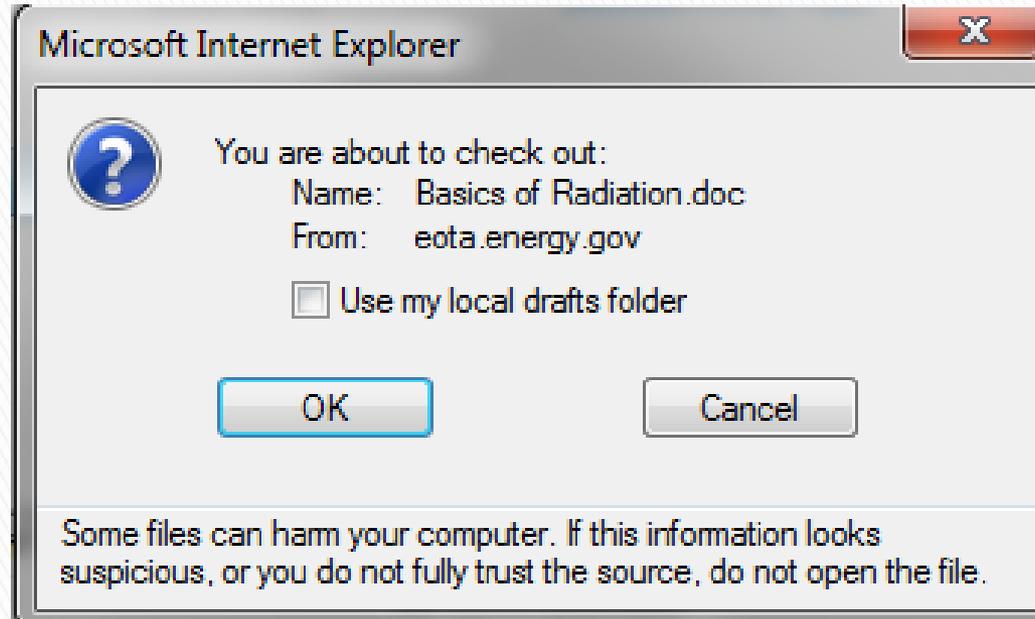
Check out the document

The screenshot shows the SharePoint interface for a document library. The ribbon menu is set to 'Library' and includes options like 'Check Out', 'Check In', 'Discard Check Out', 'View Properties', 'Edit Properties', 'Delete Document', 'Version History', 'Document Permissions', 'E-mail a Link', 'Alert Me', 'Download a Copy', 'Workflows', 'Publish', 'I Like It', and 'Tags & Notes'. The document list shows two items: 'SLA Responsibilities1' and 'Basics of Radiation'. The 'Basics of Radiation' document is selected, and its checkbox is checked. The 'Add document' button is visible below the list.

Type	Name	Effective date	Modified By	Modified	Document Type	Edit
	Document Type : Checklists (1)					
	SLA Responsibilities1 <small>NEW</small>	1/26/2012	Stoudenmire, Paul	1/27/2012 8:36 AM	Checklists	
	Document Type : Lesson Plans (1)					
<input checked="" type="checkbox"/>	Basics of Radiation <small>NEW</small>	1/27/2012	Stoudenmire, Paul	1/27/2012 11:04 AM	Lesson Plans	
	Add document					

1. Open the library containing the document
2. Select the document – clicking on the checkbox is a good way to do that
3. Select “Check Out” from the ribbon menu

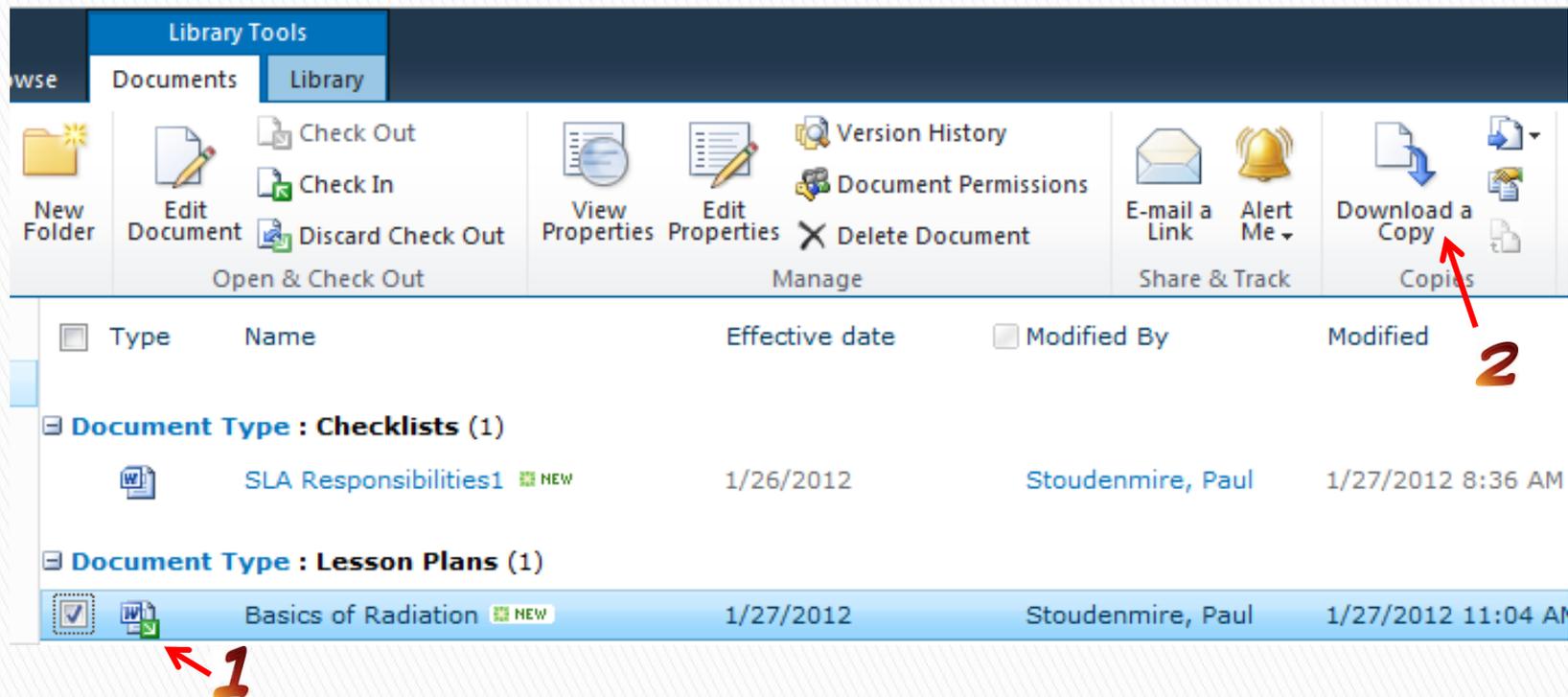
Check out the document



1. Select OK

NOTE: If you select “Use my local drafts folder” the file will be saved in the default SharePoint draft folder. This makes it easier to find and later upload. To use the local draft folder, the eota.energy.gov domain must be setup as a Trusted Site in your browser.

Download the document



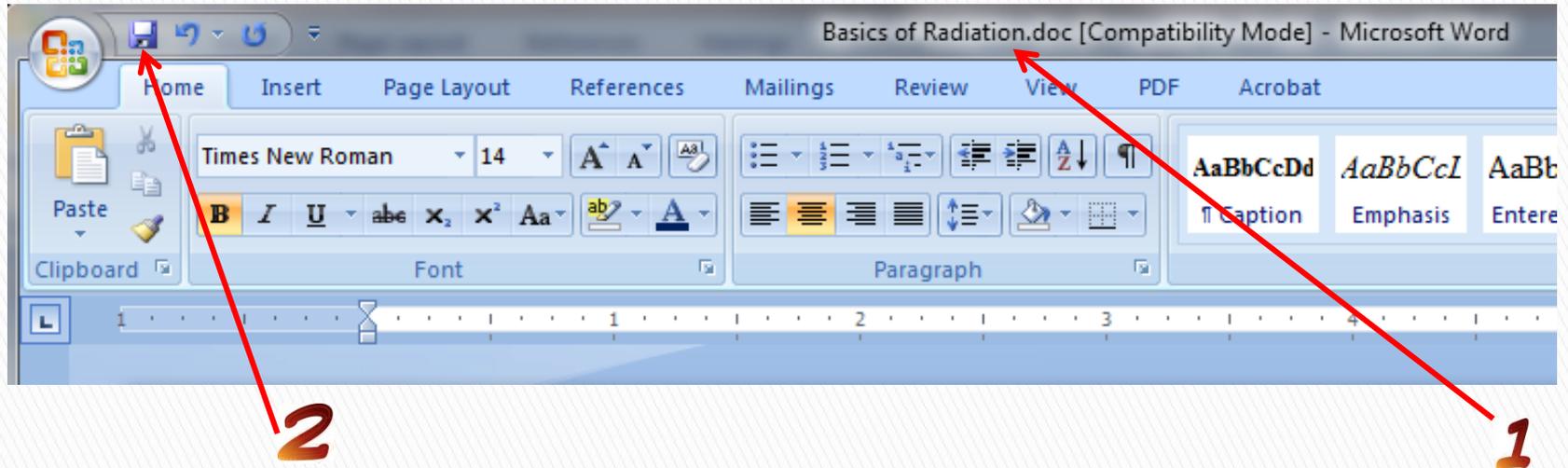
The screenshot shows a document management interface. At the top, there is a 'Library Tools' ribbon with tabs for 'Documents' and 'Library'. The 'Library' tab is active, showing a toolbar with icons for 'New Folder', 'Edit Document', 'Check Out', 'Check In', 'Discard Check Out', 'View Properties', 'Edit Properties', 'Version History', 'Document Permissions', 'Delete Document', 'E-mail a Link', 'Alert Me', and 'Download a Copy'. The 'Download a Copy' button is highlighted with a red arrow and the number '2'. Below the toolbar is a table of documents with columns for 'Type', 'Name', 'Effective date', 'Modified By', and 'Modified'. The table contains two document types: 'Checklists' and 'Lesson Plans'. The 'Lesson Plans' document 'Basics of Radiation' is highlighted with a blue background and a red arrow pointing to a down arrow icon in the 'Type' column, with the number '1' next to it.

Type	Name	Effective date	Modified By	Modified
Document Type : Checklists (1)				
	SLA Responsibilities1 <small>NEW</small>	1/26/2012	Stoudenmire, Paul	1/27/2012 8:36 AM
Document Type : Lesson Plans (1)				
	Basics of Radiation <small>NEW</small>	1/27/2012	Stoudenmire, Paul	1/27/2012 11:04 AM

1. The down arrow icon indicates the document is checked out
2. Select “Download a Copy”

NOTE: If you selected “Use my local drafts folder” in the previous step, you do not need to download a copy. It is already in your draft folder.

Edit and Save the document



1. On your local computer, navigate to the file and open the document in MS Word
2. Edit the document and select "Save"

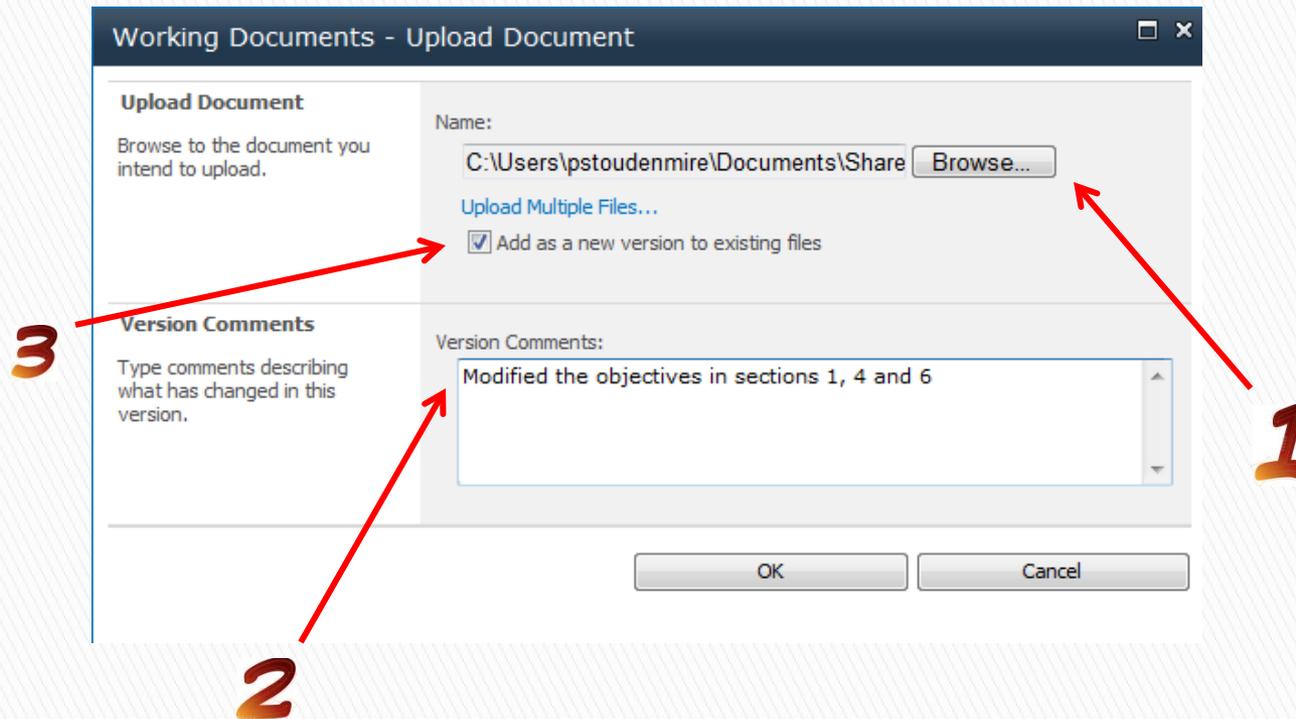
Upload the document

The screenshot shows the SharePoint library interface. The top navigation bar includes 'Site Actions' and 'Browse'. The 'Library Tools' section is active, with 'Documents' and 'Library' tabs. The 'New' group contains 'New Document', 'Upload Document', and 'New Folder'. A red arrow points to the 'Upload Document' button, which is labeled with a large orange '1'. The 'Open & Check Out' group includes 'Edit Document', 'Check Out', 'Check In', and 'Discard Check Out'. The 'View Properties' button is also visible. Below the ribbon, the 'Libraries' section is expanded, showing 'Working Documents' selected. The main content area displays a table of documents:

Type	Name
Document Type : Checklists (1)	
	SLA Responsibilities1 NEW
Document Type : Lesson Plans (1)	
<input checked="" type="checkbox"/>	Basics of Radiation NEW

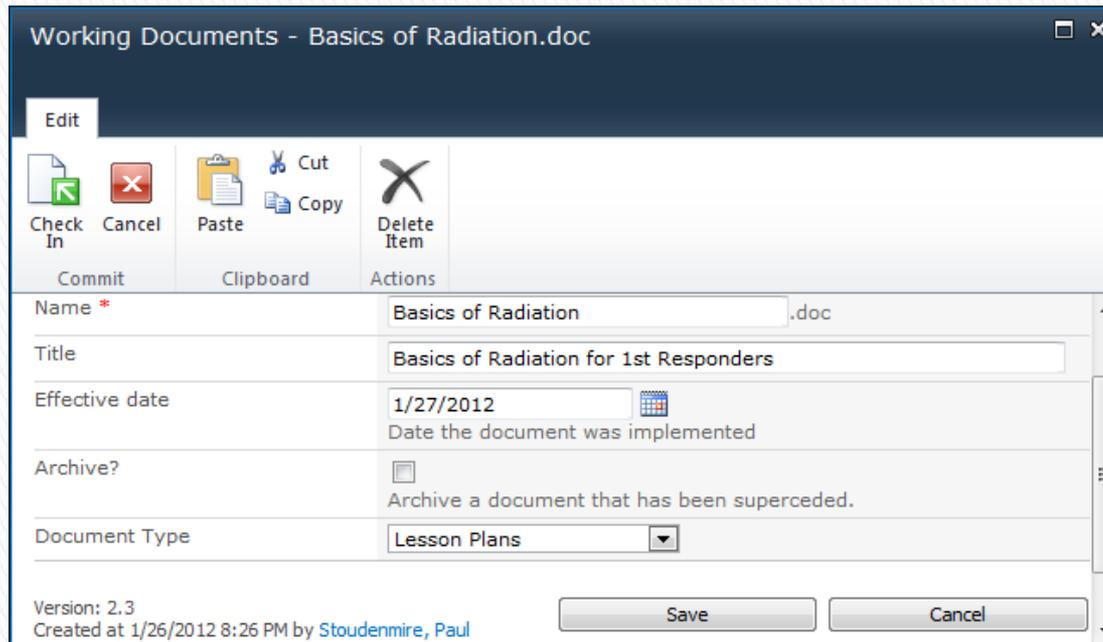
1. Select "Upload document"

Upload the document



1. Browse to location on local computer where you saved the document
2. Enter comments on what was changed in this edit
3. Check "Add as a new version"
4. Select OK

Upload the document



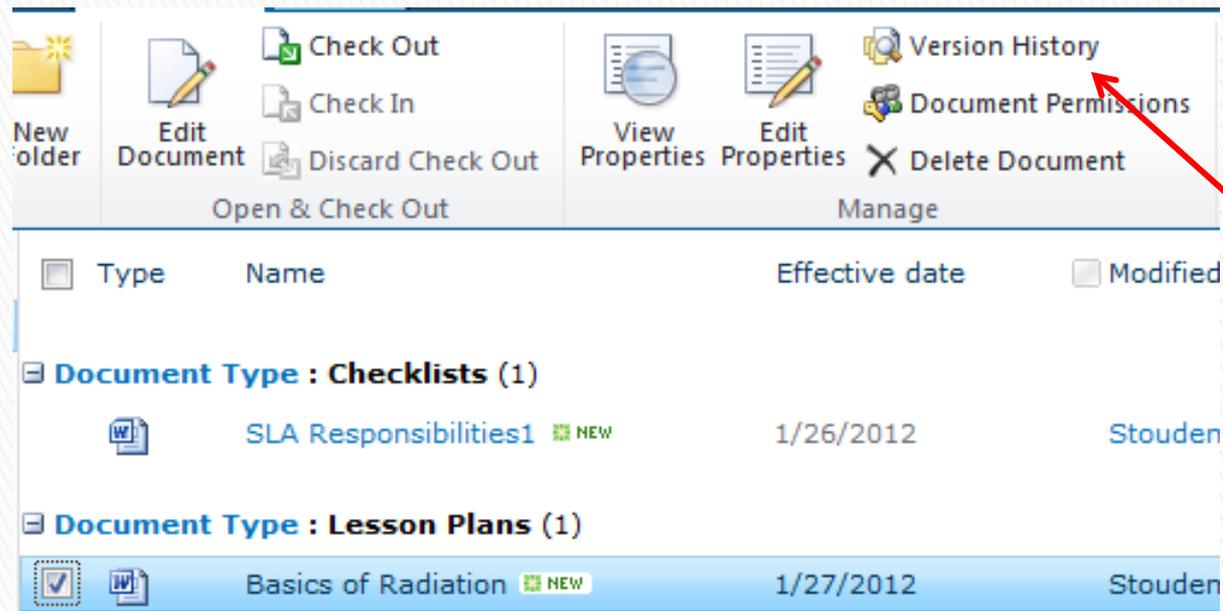
The screenshot shows a software window titled "Working Documents - Basics of Radiation.doc". The window has a dark blue header bar with a close button (X) in the top right corner. Below the header is a toolbar with several icons and labels: "Check In" (a green checkmark on a document), "Cancel" (a red X on a document), "Paste" (a clipboard with a document), "Copy" (a document with a blue arrow), "Cut" (a pair of scissors), and "Delete Item" (a black X). Below the toolbar are three tabs: "Commit", "Clipboard", and "Actions". The main area of the window is a form with the following fields:

- Name ***: Basics of Radiation .doc
- Title**: Basics of Radiation for 1st Responders
- Effective date**: 1/27/2012 (with a calendar icon) and the text "Date the document was implemented" below it.
- Archive?**: and the text "Archive a document that has been superceded." below it.
- Document Type**: Lesson Plans (with a dropdown arrow)

At the bottom left, it says "Version: 2.3" and "Created at 1/26/2012 8:26 PM by Stoudenmire, Paul". At the bottom right, there are two buttons: "Save" and "Cancel".

1. Complete or verify the metadata for this file. If this is the first time the file has been uploaded, the form will be blank. It is good practice to add a Title for the document as this will be used in version history
2. Select Save. This will also check the document back into the library

Check the Version History



1

2

1. Select the document
2. Select "Version History"

Check the Version History

1. The Version History will show you every time the document has been checked out and checked back in.
2. Major versions are considered “Published” versions

1



2

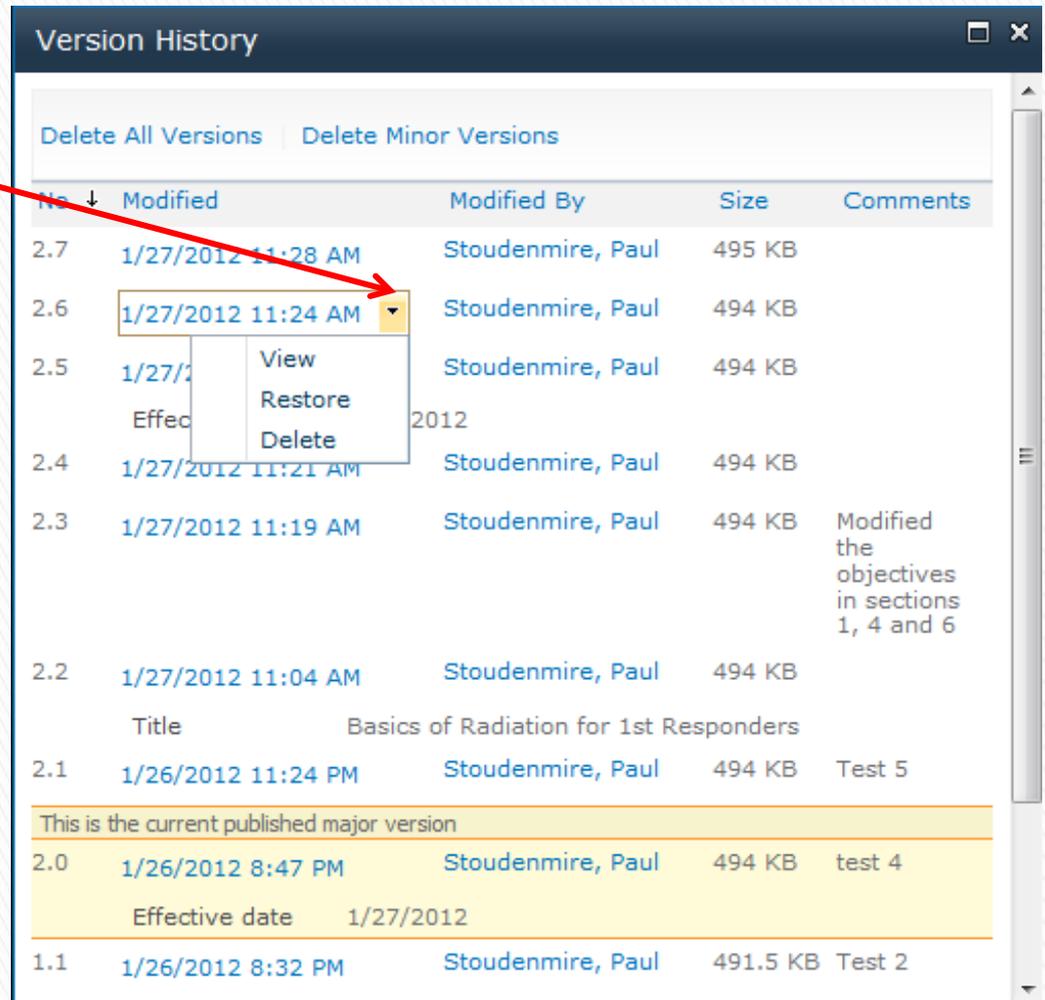


No. ↓	Modified	Modified By	Size	Comments
Delete All Versions Delete Minor Versions				
2.3	1/27/2012 11:19 AM	Stoudenmire, Paul	494 KB	Modified the objectives in sections 1, 4 and 6
2.2	1/27/2012 11:04 AM	Stoudenmire, Paul	494 KB	Title Basics of Radiation for 1st Responders
2.1	1/26/2012 11:24 PM	Stoudenmire, Paul	494 KB	Test 5
This is the current published major version				
2.0	1/26/2012 8:47 PM	Stoudenmire, Paul	494 KB	test 4
	Effective date	1/27/2012		
1.1	1/26/2012 8:32 PM	Stoudenmire, Paul	491.5 KB	Test 2
	Title	Vol F		
	Document Type	Lesson Plans		
1.0	1/26/2012 8:26 PM	Stoudenmire, Paul	491.5 KB	
	Title	1		

Managing Earlier Versions

1. Select the version
2. Select “View”, “Restore” or “Delete”
3. If you restore an earlier version, it will create a new version with the next number. In this case it would be 2.8. All earlier versions would still be available.
4. Use the restored version for future editing

1

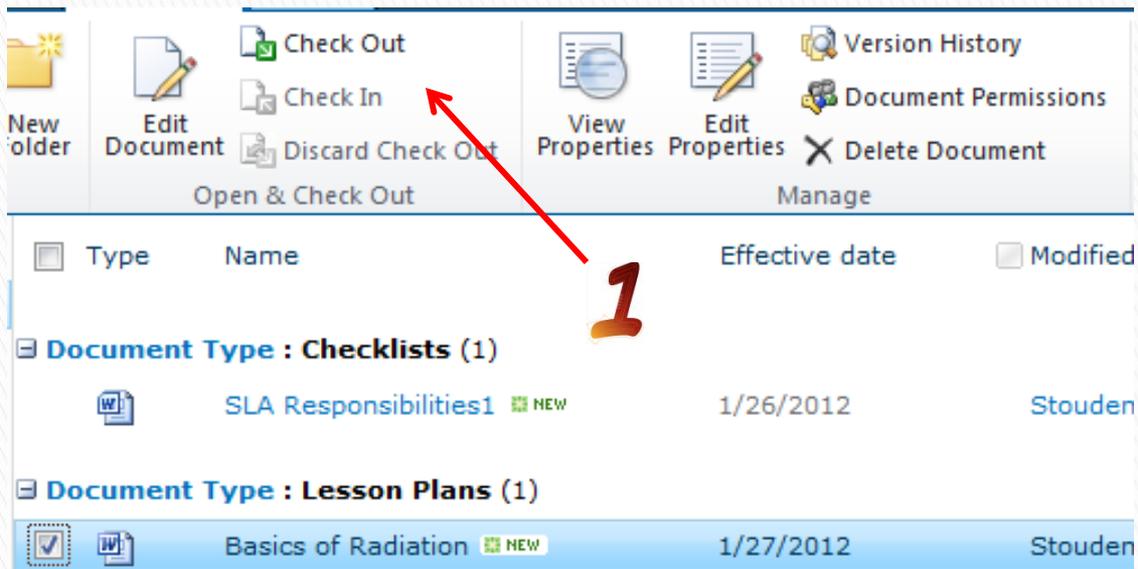


Version History

Delete All Versions Delete Minor Versions

No. ↓	Modified	Modified By	Size	Comments
2.7	1/27/2012 11:28 AM	Stoudenmire, Paul	495 KB	
2.6	1/27/2012 11:24 AM	Stoudenmire, Paul	494 KB	
2.5	1/27/2012 11:21 AM	Stoudenmire, Paul	494 KB	
2.4	1/27/2012 11:21 AM	Stoudenmire, Paul	494 KB	
2.3	1/27/2012 11:19 AM	Stoudenmire, Paul	494 KB	Modified the objectives in sections 1, 4 and 6
2.2	1/27/2012 11:04 AM	Stoudenmire, Paul	494 KB	Title Basics of Radiation for 1st Responders
2.1	1/26/2012 11:24 PM	Stoudenmire, Paul	494 KB	Test 5
This is the current published major version				
2.0	1/26/2012 8:47 PM	Stoudenmire, Paul	494 KB	test 4
	Effective date 1/27/2012			
1.1	1/26/2012 8:32 PM	Stoudenmire, Paul	491.5 KB	Test 2

Changing the Version History



1. If you want to update the current minor draft to a major draft you must check out the document and then check it back in
2. Anytime you check out a document you are able to check it in without automatically incrementing the version number by selecting “Discard Check Out”.

Changing the Version History

1. Select the type of version you want to check in.
2. Select OK

Check in

Version
Select the type of version you would like to check in.

What kind of version would you like to check in?

2.6 Minor version (draft)
 3.0 Major version (publish)
 2.5 Overwrite the current minor version

Retain Check Out
Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in.

Retain your check out after checking in?

Yes No

Comments
Type comments describing what has changed in this version.

Comments:

OK Cancel

2