

Microsoft SharePoint

Owner: Setting Versioning



Introduction

In the documents area there are various settings for versioning. You can require approval for changes that have been made to documents. You can set major or minor versioning. If all of your users are using MS Office 2003 or 2007 you can require check out when a document is edited.

Process Summary

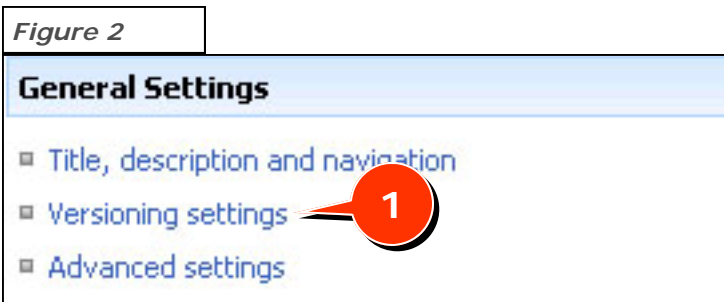
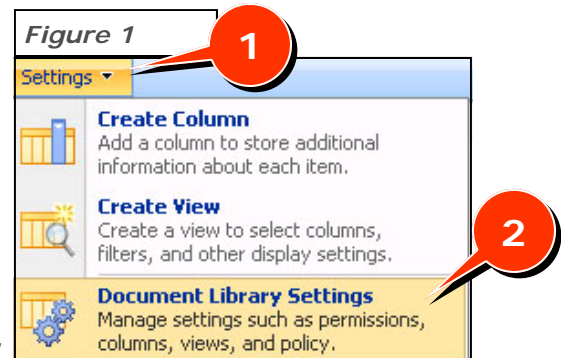
Versioning

1. Require approval
2. Versioning
3. Require Check Out

Require Approval

Requiring approval for uploaded documents and changes made to existing documents

1. Open your **SharePoint** site.
2. Click on **Project Documents** or **any other document link**.
3. Click on the **Drop down arrow** next to **Settings** (Fig 1, 1).
4. Select **Document Library Settings** (Fig 1, 2).
5. Under **General Settings** select **Versioning Settings** (Fig 2, 1).
6. Select **Yes** at **Content Approval** (Fig 3, 1) to require approval for submitted items.
7. At **Draft Item Security** select who can see draft items.
8. Select **Any user who can read items** (Fig 3, 2) if you want everyone to see drafts.
9. Select **Only users who can edit items** (Fig 3, 3) if you want only the users who have editing privileges to view.
10. Select **Only users who can approve items (and the author of the item)** (Fig 3, 4) if you want only users with approval privileges to view.
11. If you want to turn on versioning for your documents follow the steps under **Versioning**.
12. If you want to **Require Check Out** follow the steps under **Require Check Out**. Only users running MS Office 2003 or 2007 will have this feature available to them. If they do not they will not be able to edit a document with this feature turned on.
13. Click **Ok** (Fig 3, 13).



Versioning


Versioning will be automatically turned on when your site is created. However, any new document areas you add, you as the site owner will need to turn versioning on if you want that feature.

NOTE: Versioning isn't just for document libraries, it is available for all lists!

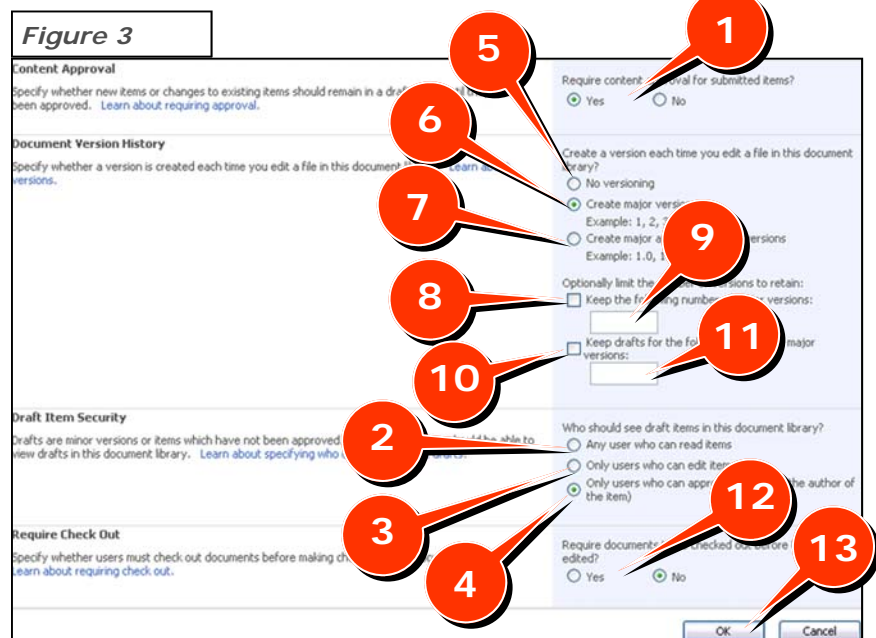
1. Open your **SharePoint** site.
2. Click on **Project Documents** or **any other document link**.
3. Click on the **Drop down arrow** next to **Settings** (Fig 1, 1).
4. Select **Document Library Settings** (Fig 1, 2).
5. Select **Versioning Settings** under **General Settings** (Fig 2, 1).
6. Under **Document Version History** select **No Versioning** (Fig 3, 5) if you don't want versioning.
7. Select **Create major versions** (Fig 3, 6) if you want your documents to be number 1, 2, 3, 4.
8. Select **Create major and minor (draft) version** (Fig 3, 7) if you want the numbering sequence to be 1.0, 1.1, 1.2, 2.0.
9. Select **Keep the following number of major version** (Fig 3, 8) and type the number you want to keep in the box (fig 3, 9).


10. Select **Keep drafts for the following number of major version** (Fig 3, 10) and type the number you want to keep, in the box (Fig 3, 11).

11. If you want to **Require Check Out** follow the steps under **Require Check Out**.


 Only users running MS Office 2003 or 2007 will have this feature available to them. If they do not they will not be able to edit a document with this feature turned on.

12. Click **Ok** (Fig 3, 13).



 Versioning can drain a site's quota quickly, so be sure to manage all of the versions you have created

Require Check Out

 You can require items to be checked out before they are edited. This feature will only work if your users have MS Office 2003 and 2007. If you turn this feature on and they do not have MS Office 2003 or 2007 they will not be able to edit the document. They may think they are making changes but they will be unable to save the document to your SharePoint site.

1. Open your **SharePoint** site.
2. Click on **Project Documents** or **any other document link**.
3. Click on the **Drop down arrow** next to **Settings** (Fig 1, 1).
4. Select **Document Library Settings** (Fig 1, 2).
5. Select **Versioning Settings** under **General Settings** (Fig 2, 1).
6. Select **Yes** under **Require Check Out** (Fig 3, 12).
7. Click **Ok** (Fig 3, 13).