

NCI Technologies presents:

Microsoft® Office
SharePoint® Server 2007
Training

**SharePoint document libraries III:
Work with version history**

Course contents

- Overview: The advantages of version history
- Lesson: Review and restore versions

The lesson concludes with a short set of questions to test your understanding of the material.

Overview: The advantages of version history



Does your company use a Microsoft Windows® SharePoint Services 3.0 site or Microsoft Office SharePoint Server 2007?

It's possible that your libraries are set up to store previous versions, in which case, great advantages are available to you.

Take this course to find out why.

Course goals

- Discover whether your library stores previous versions for you.
- View the version history of a file.
- Restore a previous version of a file.
- Learn the difference between major and minor versions, and why you'd specify either one.

Lesson

Review and restore versions

Review and restore versions



Have you ever worked on a document for an extended period of time — weeks, months, even years?

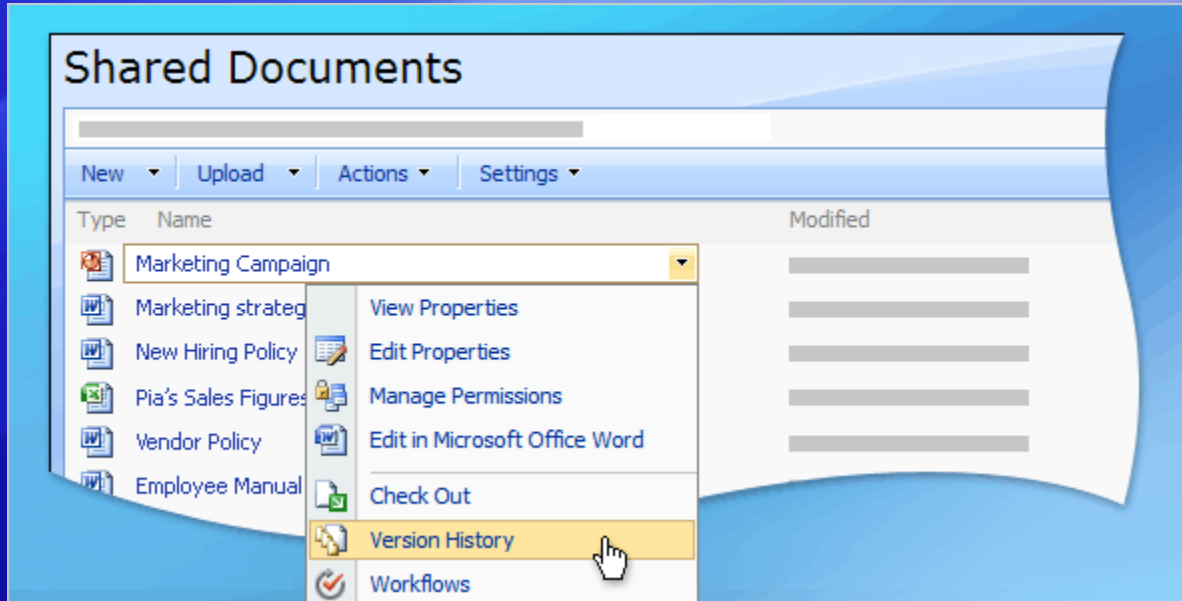
It's amazing how much a file can change.

But what if you do want to see the original, or a previous version to remind yourself of a certain decision? Or go “back in time” to correct a mistake by restoring the document to an older version?

You can do that when **versions** are enabled for a SharePoint document library.

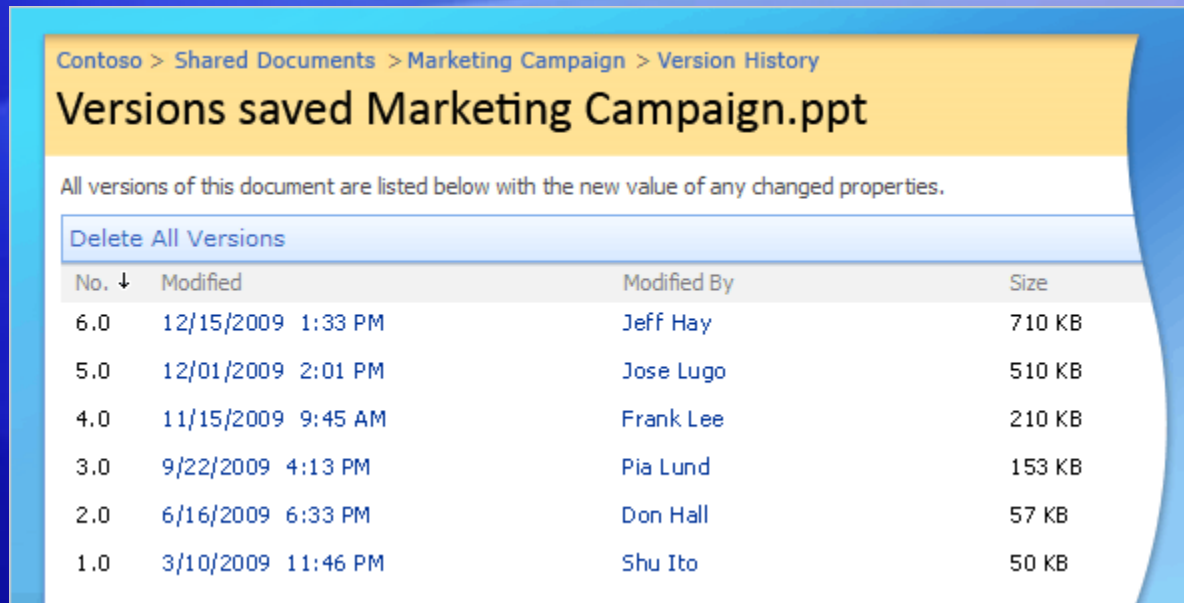
How to find out if versions are stored

How do you tell if your library tracks versions?



Place your mouse over a file, click the down arrow that appears, and then look for the **Version History** command.

What the history looks like



The screenshot shows the 'Version History' page for a document named 'Marketing Campaign.ppt'. The breadcrumb path is 'Contoso > Shared Documents > Marketing Campaign > Version History'. The title is 'Versions saved Marketing Campaign.ppt'. Below the title, a note states: 'All versions of this document are listed below with the new value of any changed properties.' There is a 'Delete All Versions' button. A table lists the versions, with columns for 'No.', 'Modified', 'Modified By', and 'Size'. The current version (6.0) is at the top.

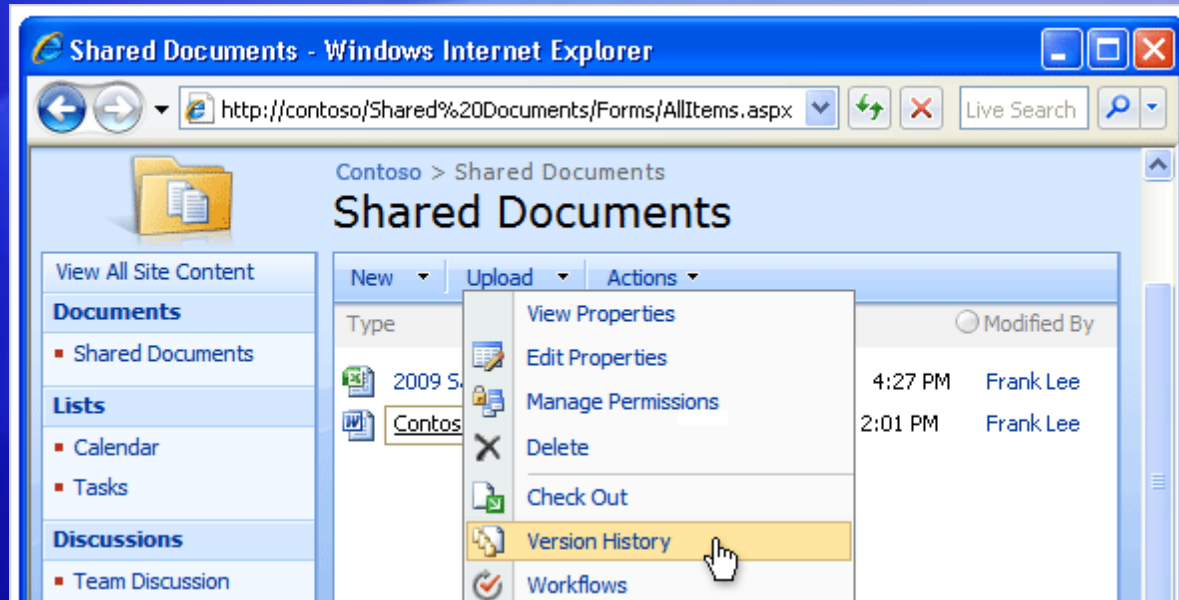
No. ↓	Modified	Modified By	Size
6.0	12/15/2009 1:33 PM	Jeff Hay	710 KB
5.0	12/01/2009 2:01 PM	Jose Lugo	510 KB
4.0	11/15/2009 9:45 AM	Frank Lee	210 KB
3.0	9/22/2009 4:13 PM	Pia Lund	153 KB
2.0	6/16/2009 6:33 PM	Don Hall	57 KB
1.0	3/10/2009 11:46 PM	Shu Ito	50 KB

When you click **Version History** for a file, you see a list of versions, each with a version number and the date and time of the version.

You can also see who changed the file for each version. The current version is listed at the very top.

How to look at older versions

How do you actually open an older version of a file so that you can refer to it?



You click the version date and time. Keep in mind that previous versions open as read-only files — they cannot be edited.

To do that, start by clicking the **Version History** command, as shown here.

When versions are created

1. When you first add the file to the library
2. When you edit a file, save, and then close the file.
3. When you check out, edit, and check in a file.

When are versions created?

In a handful of instances.

The most important times to know about are when you:

- ① First add a file to the library.
- ② Edit a file, save, and then click the file.
- ③ Check out, edit, and check in a file.

Capture your work as a version

Versions saved Sales Pitch.pptx

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

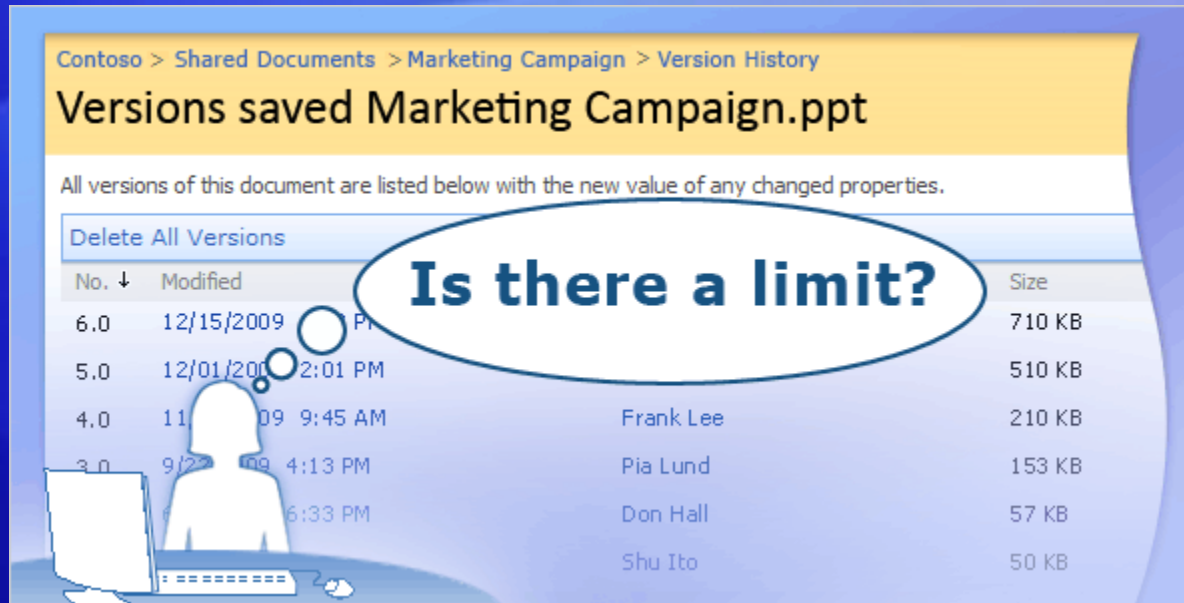
No. ↓	Modified	Modified By	Size	Comments
3.0	3/12/2009 4:13 PM	Frank Lee	153 KB	Wrote slides 12-22
2.0	3/11/2009 6:33 PM	Frank Lee	57 KB	Wrote slides 10-11
1.0	3/10/2009 11:46 PM	Frank Lee	50 KB	Wrote slides 1-9

If you want to use comments to describe the work you did for a version, you'll want to check out the file, edit it, save it, and then check it in.

When you check the file in, you can add comments describing the work you did.

This is what Frank Lee did with this file three times. Each time, he checked the file out, edited and saved it, and then checked it in, adding a comment each time.

Is there a limit on versions?



Contoso > Shared Documents > Marketing Campaign > Version History

Versions saved Marketing Campaign.ppt

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

No. ↓	Modified	Size
6.0	12/15/2009 12:01 PM	710 KB
5.0	12/01/2009 12:01 PM	510 KB
4.0	11/11/2009 9:45 AM	210 KB
3.0	9/23/2009 4:13 PM	153 KB
	6:33 PM	57 KB
		50 KB

Frank Lee
Pia Lund
Don Hall
Shu Ito

Is there a limit?

Is there a limit to the number of versions you can store in a library?

In most cases, no.

But be aware that the people in charge of your site can set limits if they want to save disk space on the site.

When you reach such a limit, the oldest drafts get deleted first.

Is there a limit on versions?

Contoso > Shared Documents > Marketing Campaign > Version History

Versions saved Marketing Campaign.ppt

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

No. ↓	Modified	Author	Size
6.0	12/15/2009 11:09 AM	Pia Lund	710 KB
5.0	12/01/2009 2:01 PM	Frank Lee	510 KB
4.0	11/11/09 9:45 AM	Frank Lee	210 KB
3.0	9/23/09 4:13 PM	Pia Lund	153 KB
2.0	9/23/09 6:33 PM	Don Hall	57 KB
1.0		Shu Ito	50 KB

Is there a limit?

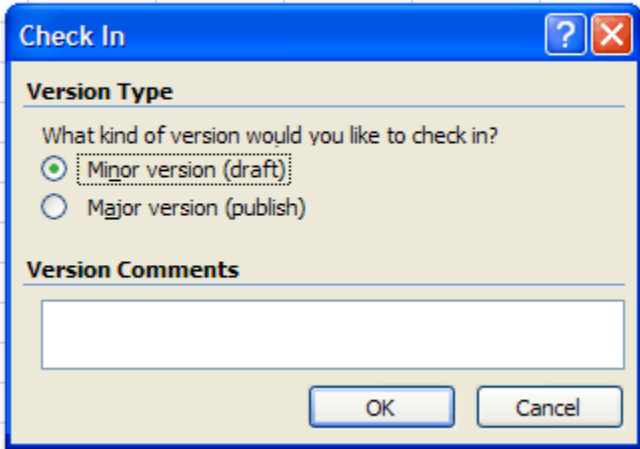
This is often not a concern.

Documents usually become better and better as they progress, so the oldest versions become less valuable.

But if you're concerned about saving every single past version, ask the person who set up your library to tell you the number of versions that are being stored.

Major and minor versions

	A	B	C	D	E	F	G	H	I
1	Contoso Sales Report								
2	January	\$24,733							
3	February	\$27,477							
4	March	\$27,232							
5	April	\$25,423							
6	May	\$21,044							
7	June	\$27,477							
8	July	\$21,536							
9	August	\$25,089							
10	September	\$23,947							
11	October	TBA							
12	November	TBA							
13	December	TBA							
14									



Some libraries are set up to track two kinds of versions: minor versions and major versions.

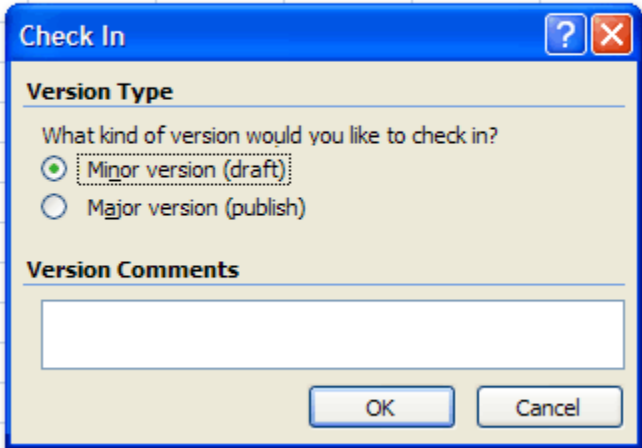
You'll know this if you check in a file and you are asked to choose between the two.

Here's what each one means:

- A minor version is a version in progress, for example, a version that contains incomplete sales figures.
- A major version is one that's ready for a larger group to see, for example, the one with final sales figures.

Major and minor versions

	A	B	C	D	E	F	G	H	I
1	Contoso Sales Report								
2	January	\$24,733							
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4	March	\$27,232							
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10	September	\$23,947							
11	October	TBA							
12	November	TBA							
13	December	TBA							
14									

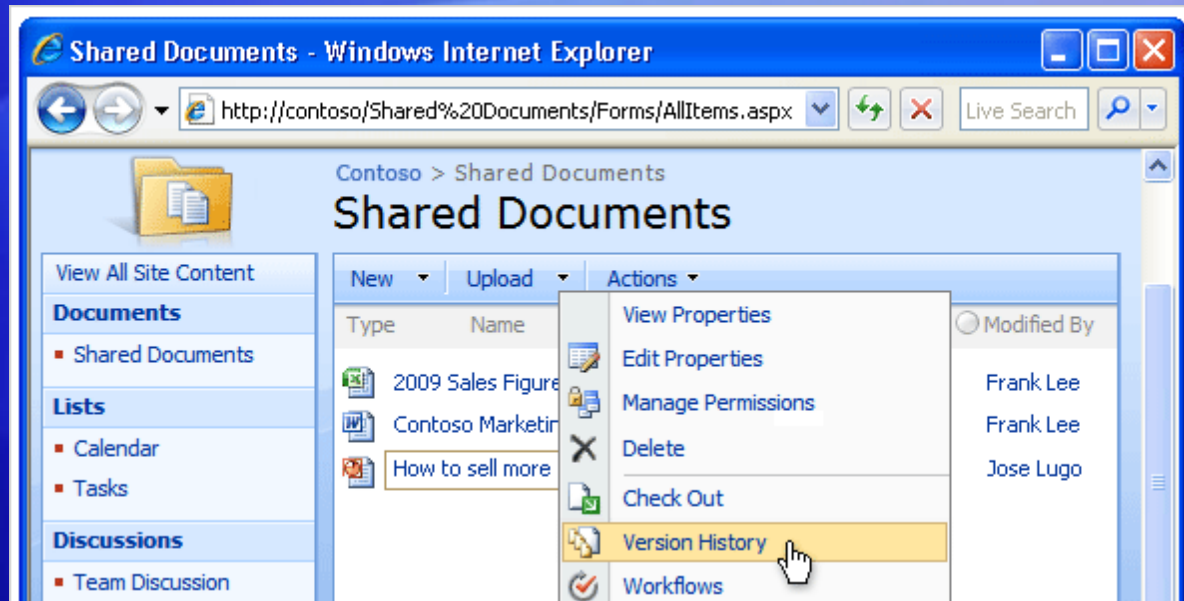


If you're prompted to choose between these two versions, the library may react differently depending on which one you choose.

For example, if you specify a minor version, the library may automatically hide that file from certain people's view of the library — people who do not have permissions to review works in progress.

If you specify a major version, the file may get published to a larger group of people so that they can see it.

How to restore a file to a previous version

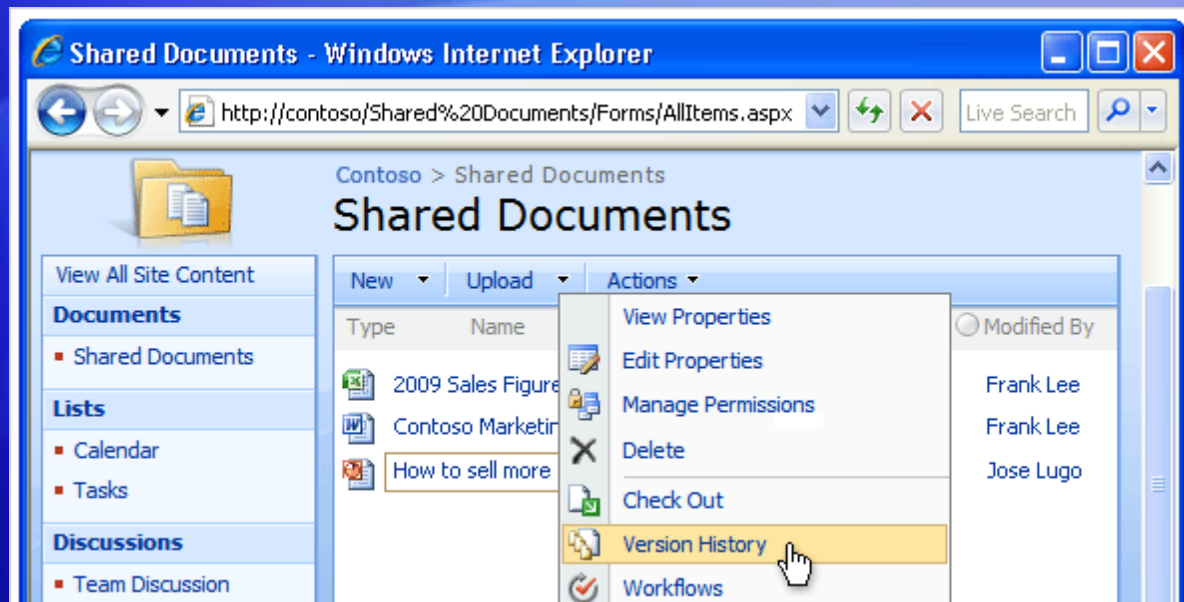


What if you don't like the current version of the file, and you want to restore a previous version to be the current version?

You can do that.

This capability is especially handy if you make a serious mistake in the current version, for example, deleting all the slides in a PowerPoint presentation and accidentally checking it back in.

How to restore a file to a previous version



What if you don't like the current version of the file, and you want to restore a previous version to be the current version?

You can do that.

To restore a previous version, click **Version History** as shown in the picture.

Then locate a version of the file that contains all the slides, click the arrow next to the slide, and then click **Restore**.

Test question 1

How can you find out if your library stores versions? (Pick one answer.)

1. Place your mouse over the file, click the down arrow that appears, and then see if **Minor and Major Versions** is available.
2. Place your mouse over the file, click the down arrow that appears, and then see if **Version History** is available.
3. Place your mouse over the file, click the down arrow that appears, and then see if **The History of Versions** is available.
4. Place your mouse over the file, click the down arrow that appears, and then see if **Manage Versions** is available.

Test question 1: Answer

Place your mouse over the file, click the down arrow that appears, and then see if **Version History** is available.

Test question 2

To view a past version of a file, you place your mouse over the file, click the down arrow that appears, and then do which of the following? (Pick one answer.)

1. Click **Edit in Microsoft Word**. When the file opens, scroll through the document to see each version date. Click a date, and the program will scroll to a separate page containing that version.
2. Click **Version History**. On the next page, click the top version date. You'll be asked which version to open. Click a date.
3. Click **Version History**. On the next page, click a version date in the past.
4. Click **Historical Entities**. On the next page, click **Manage Copies**, and then click a past date.

Test question 2: Answer

Click **Version History**. On the next page, click a version date in the past.

Test question 3

Which of the following will NOT cause a version to be created? (Pick one answer.)

1. Selecting **Discard Check Out**.
2. Clicking a file, selecting **Edit and Check Out**, saving the file, and then closing it.
3. Clicking a file, choosing **Edit**, saving the file, and then closing it.
4. Saving a file to a library.

Test question 3: Answer

Selecting **Discard Check Out**.

Doing so will get rid of the version you're working on.