# University of California 2015-25 Capital Financial Plan
## Guidelines – SharePoint Tips
June 2015

Microsoft© SharePoint is used to implement the production and review of documents for the **2015-25 Capital Financial Plan**.

[https://sp2010.ucop.edu/departments/bcr/cfp](https://sp2010.ucop.edu/departments/bcr/cfp)

A. The campuses will have access to <u>three</u> "libraries," each with subfolders:
   1. Documents Library
      - Primary Folder - contains the campus Project Summary Table and Project Sheet.
      - Financial Folder -for the upload of the Debt Affordability Model 1.0, Ten-Year Housing Plan, and Medical Center Projected Financials
      - Campus Map Folder
   2. Pictures Library
      - Photo Library Folder (for the upload of campus pictures)
   3. General Items Library
      - Instructions Folder: Timeline Flowchart, **Guidelines**-*Project Summary Table and Sheet*, **Guidelines**-Photos & Maps, SharePoint Tips, and Project Sheet blank template for your use.

B. Instructions to Campus Task Owners
   1. OP will send an email to indicate that documents have been released for campus updates.
   2. After logging on, begin under **My CIP Book Tasks**, go to **Step 2: Campus Document Updates**, click the pull down and go to **Edit Item**, and change the **Status** to **In Progress**.
   3. When the campus has completed its review and are ready to release the documents back to OP, return to **My CIP Book Tasks**, go to **Step 3: Campus Document Updates**, click the pull down and go to **Edit Item**, and change the **Status** to **Completed**.
   4. Note the Steps 1-3 will change as we progress through the review periods.

C. Instructions to All Users
   1. All users must "check in" and "check out" documents from the library.
      a. SharePoint 2010 - How to Check Out and Check In Documents
         [http://www.youtube.com/watch?v=zvigtSAixa4](http://www.youtube.com/watch?v=zvigtSAixa4)
   2. Check out of a document prevents other Users from updating the document. While the document is checked out, other Users can view a read-only version that will not include any changes being made to the checked-out document.
   3. Check in of a document makes it available to other Users to check out. This will also allow other Users to see changes made to the document by the previous User.
   4. When possible, while checking in material, please add a brief note regarding the updates made into the box that pops up.
   5. **IMPORTANT: NEVER CHANGE THE NAME OF THE FILE.** SharePoint requires a consistent file name in order to track and restore previous versions.

**Questions regarding these Guidelines, contact Linneth Cox at (510) 987-9317 or [linneth.cox@ucop.edu](mailto:linneth.cox@ucop.edu).**