How to Upgrade Your Site to the New User Interface

Site Administrators can “preview” their existing site in the new user interface. We recommend that you do this first to make sure that all of the elements of your site look and work OK.

Remember that there are usually at two or more Site Administrators. Make sure that you discuss this first with all of them.

Click Site Actions > Visual Upgrade.

Choose Preview the updated user interface and click OK.

Then, when you decide to permanently upgrade your site, do the following:

- Make sure all of your pages/documents are “checked in”.
- Make sure you tell all of your site users about the change.
- Click Site Actions > Visual Upgrade.
- Choose Update the user interface and click OK. This action cannot be undone!
The following tutorial on the MS Office website gives you a very comprehensive overview of how to get around using the new user interface and how to use some of the new features. We recommend that everyone take a few minutes to view it:


This rest of this document highlights some of the most apparent changes you will see once your site is upgraded to the new user interface.

**The Ribbon**

The new user interface includes the **Ribbon** which you are already familiar with if you use the other MS Office 2007/2010 applications. The **Ribbon** has the commands you need when you need them and they are grouped logically under tabs.

When you go to a page in your site the **Browse** tab is active by default.

To the right of Browse you have “context sensitive” tabs which change depending on where you are and what you are doing. For instance, when you are in a Document Library there is a **Library** tab and a **Documents** tab. The **Library** tab has commands that you need to work in the Library (i.e., Create View or Alert Me). The **Documents** tab has the commands that you need to work on documents (i.e., Upload Document or Check In). Another example is when you are in a Calendar you have an **Events** tab and a **Calendar** tab each with the appropriate commands that you need.

In addition, if you are a Site Administrator, the Ribbon has the tools you need for editing and managing the elements of your site.
Site Actions

The Site Actions menu is now in the Ribbon area to the left of the Browse tab. Click it to access View All Site Content, Site Settings and Site Permissions.

You will now see the following new options under Site Actions:

- New Page
- New Document Library
- New Site
- More Options

Quick Launch

Quick Launch (the navigation pane on the left) is basically the same in SharePoint 2010.

All Site Content has moved down to the bottom of the Quick Launch pane.

People and Groups will only be in the Quick Launch for existing sites that were migrated. People and Groups can also be found under Site Actions > Site Settings.
Page Title Area

The Page Title area is displayed when you click the Browse tab on the Ribbon. It contains links ("breadcrumbs") which show you where you’ve navigated to in the site. You can click the breadcrumbs to navigate back to another level.

![Page Title Area Diagram]

There is also a Navigate Up button to the left of the Browse tab on the Ribbon. This is another way to navigate back to another level in the site.

Change Views

You can go to another view, modify a view or create a new view by clicking the drop down arrow next to the default view link in the Page Title area.

![Change Views Diagram]

For example when you are in a Document Library click the drop down arrow next to All Documents and choose another view.

View commands are also available on the Ribbon under the Library/List/Calendar tab.
Select Multiple Items
You can select multiple items and perform certain actions on all of them at once.

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Operations Forms</td>
</tr>
<tr>
<td>✓</td>
<td>Operations Report</td>
</tr>
</tbody>
</table>

For example to select multiple documents in a Library click to select each one (or click the Select All check box) and then choose an action on the Ribbon (i.e, Delete or Check Out).

View/Edit Documents in the Web Browser
Office Web Apps is a new feature in SharePoint 2010 that, when activated, allows you to take a quick peek at a document and to avoid the “read only” prompt.

The Office Web Apps feature must be activated by the Site Administrator first:

- Go to Site Actions > Site Settings.

Under Site Collection Administration choose Site Collection Features.

Scroll down to Office Web Apps and click the Activate button.
Now when you click a document in the Library it will open in the browser (read only).

Click Edit in Browser to make changes.

The document is not opened in the full application and editing tools are limited (you have a “light” version of the Ribbon).

If you need to have full capabilities to make major revisions you can open the document in the full application (i.e. click Open in Word).

Create a Subsite

To create a subsite click Site Actions > New Site. With SharePoint 2010 there are many site templates to choose from.

- Click Create.

Getting started links are provided to assist you with setting permissions and themes, etc.

These links can be deleted later because you will no longer need them once the site is set up.