

Using SharePoint

MMB Budget Division Document Management SharePoint site

Revised June 2018

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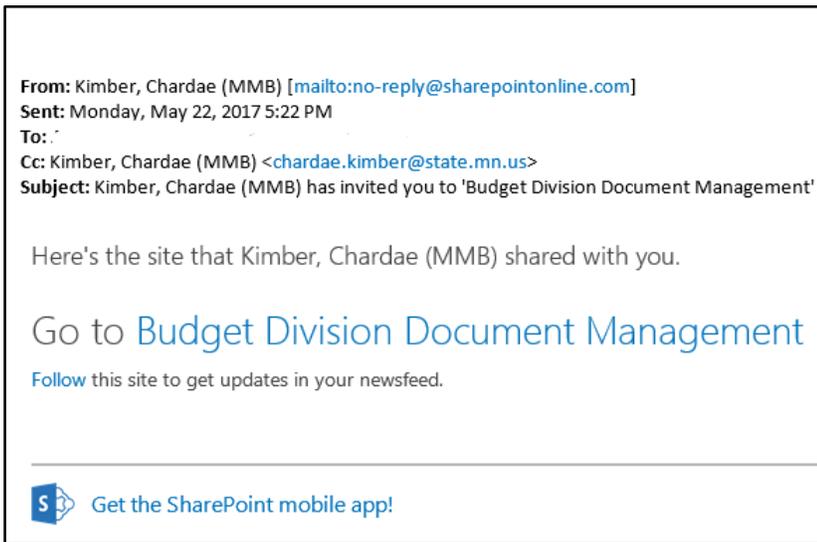
SharePoint Access, Login and Assistance

Access

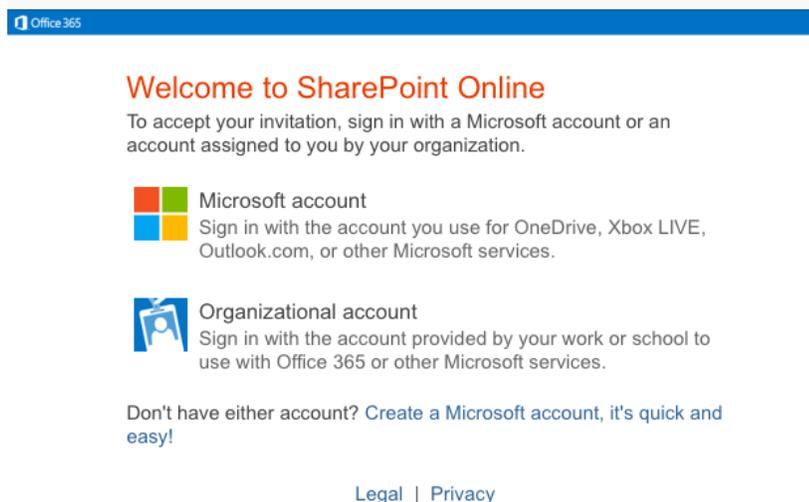
Request access to the Budget Division Document Management SharePoint site with the [Budget Systems User Authorization Form](#) and email to budget.finance.mmb@state.mn.us.

New User to the Budget Division Document Management SharePoint Site

If you are a new SharePoint user and are requesting access to the site for the first time through the authorization form, the SharePoint site will be shared with you by MMB Budget Planning and Operations. You should receive an email with a link to the site. The message will be sent from no-reply@sharepointonline.com. The subject line will contain the name of the person who initiated the sharing request. The personal invitation text will appear below the greeting.



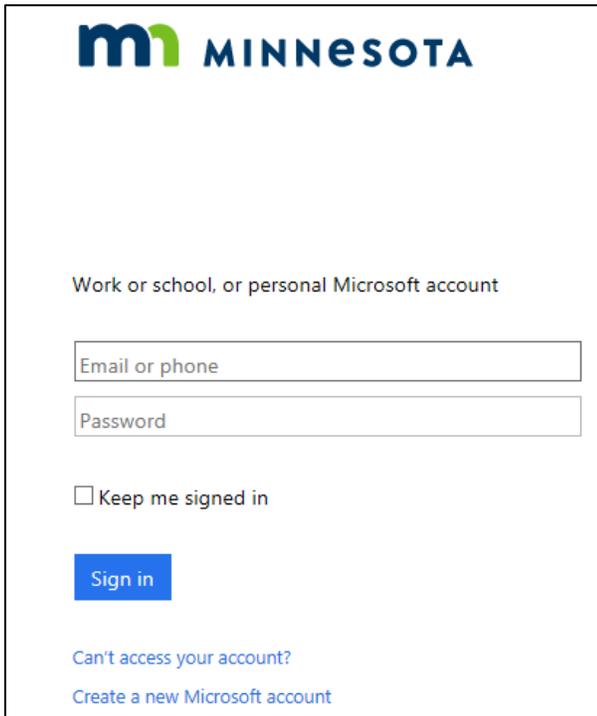
Upon clicking the site link from the email, you will be asked to sign in with either your organization’s Office 365 account or another Microsoft account associated with your email address. Sign on with the organizational account and enter your state email address. You should not need to enter a password unless you are accessing the SharePoint site from outside of the State network.



Login

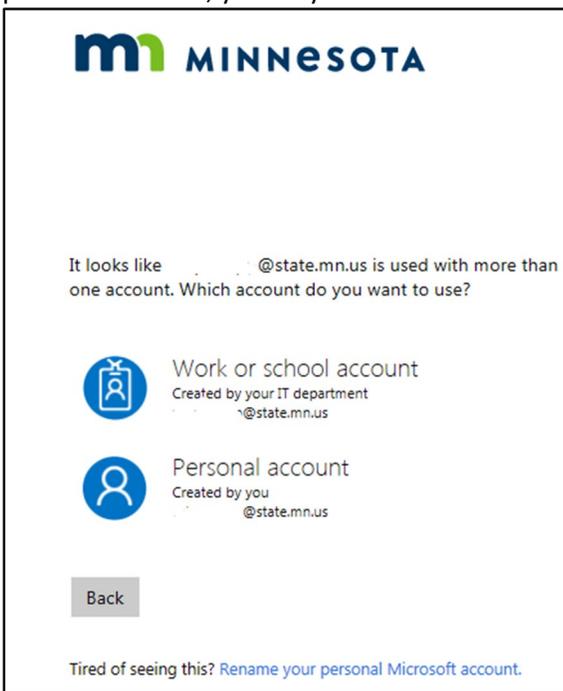
The Budget Division Document Management SharePoint site is available at:

<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>. After clicking on the link, it will require you to login using the screen shown below.



The screenshot shows the Microsoft login interface. At the top left is the 'mi MINNESOTA' logo. Below it, the text reads 'Work or school, or personal Microsoft account'. There are two input fields: 'Email or phone' and 'Password'. Below the password field is a checkbox labeled 'Keep me signed in'. A blue 'Sign in' button is positioned below the checkbox. At the bottom of the form, there are two links: 'Can't access your account?' and 'Create a new Microsoft account'.

To login, use your state email address and click or tab out of the email field. The SharePoint site should recognize your email from Outlook and will automatically log you into Microsoft Office 365, you should only need to enter a password if you are outside of the state network. If you have a work or school account and a personal account, you may need to choose which one to access as shown below.



The screenshot shows a Microsoft account selection screen. At the top left is the 'mi MINNESOTA' logo. Below it, the text reads 'It looks like [redacted]@state.mn.us is used with more than one account. Which account do you want to use?'. There are two account options listed: 'Work or school account' (Created by your IT department, [redacted]@state.mn.us) and 'Personal account' (Created by you, [redacted]@state.mn.us). A 'Back' button is located below the account options. At the bottom of the screen, there is a link: 'Tired of seeing this? Rename your personal Microsoft account.'

Non Office 365 Users

If your organization is already on the Microsoft Cloud (Office 365), you currently have an organizational account. The link you received should be sufficient to log into the SharePoint site.

For agencies and users who are not on Office 365, see [Appendix A](#) for detailed instructions about accessing the MMB Budget Division Document Management SharePoint site.

Assistance

Email MMB Budget Operations email box at budget.finance.mmb@state.mn.us, if you have access questions or questions related to SharePoint features or functions. MMB will review all emails and work with MN.IT services if more technical expertise is needed.

Budget Division Document Management SharePoint Home Page

The screenshot shows the SharePoint home page for Budget Division Document Management. On the left is a navigation menu listing various state agencies. The main area has a welcome message, a 'General Announcements' section with a 'new announcement' button, and a 'Budget Division Calendar' for June 2017. The calendar shows dates from Sunday 28 to Saturday 3.

1. All state agency libraries are listed down the left-hand side of the page.
2. The Shared Templates library contains documents and information that all agencies can access.
3. The announcements and calendar features display announcements and dates related to the budget related processes. This section is updated by MMB.

The Agency Library

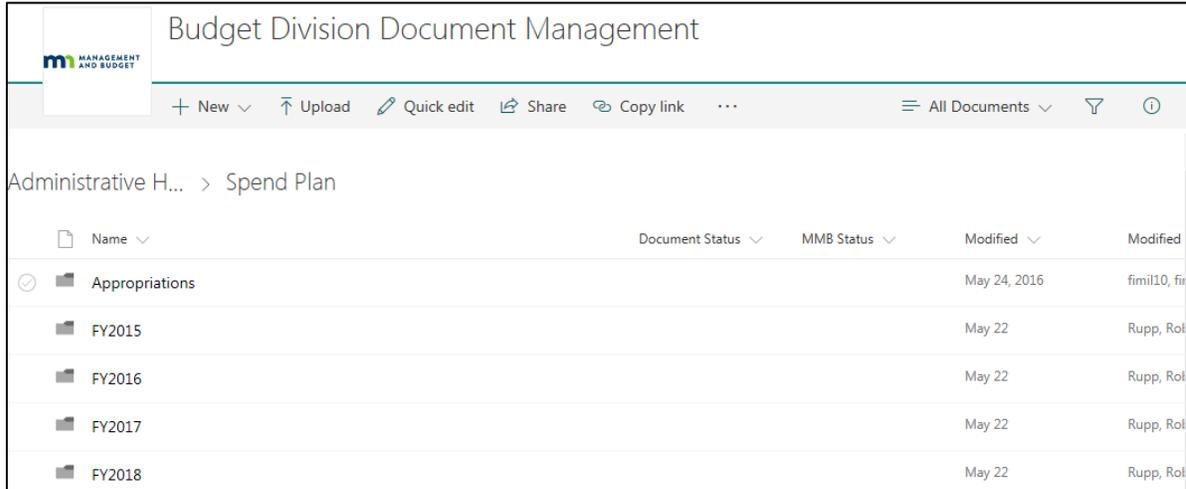
Click on your agency name to enter the agency library. Each agency library has the same folders.

The screenshot shows the 'Administrative Hearings' library view. At the top, there are navigation buttons for '+ New', 'Upload', 'Quick edit', 'Sync', and 'All Documents'. Below is a table with the following data:

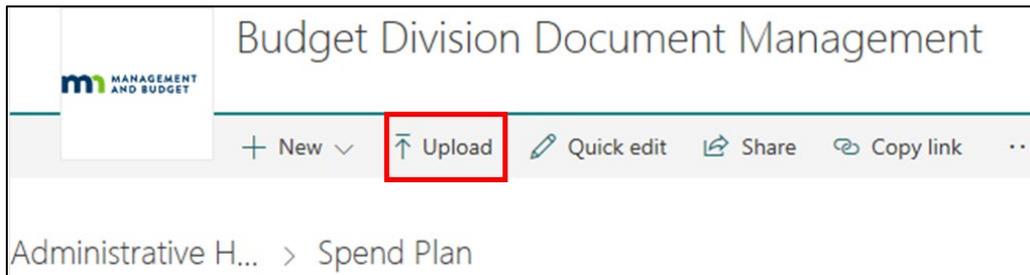
Name	Document Status	MMB Status	Modified	Modified
Biennial Budget			May 16, 2014	Drinkwine
LAC			May 16, 2014	Drinkwine
Legislative Initiatives			May 16, 2014	Drinkwine
Spend Plan			May 16, 2014	Drinkwine

Uploading a Document to the SharePoint Site

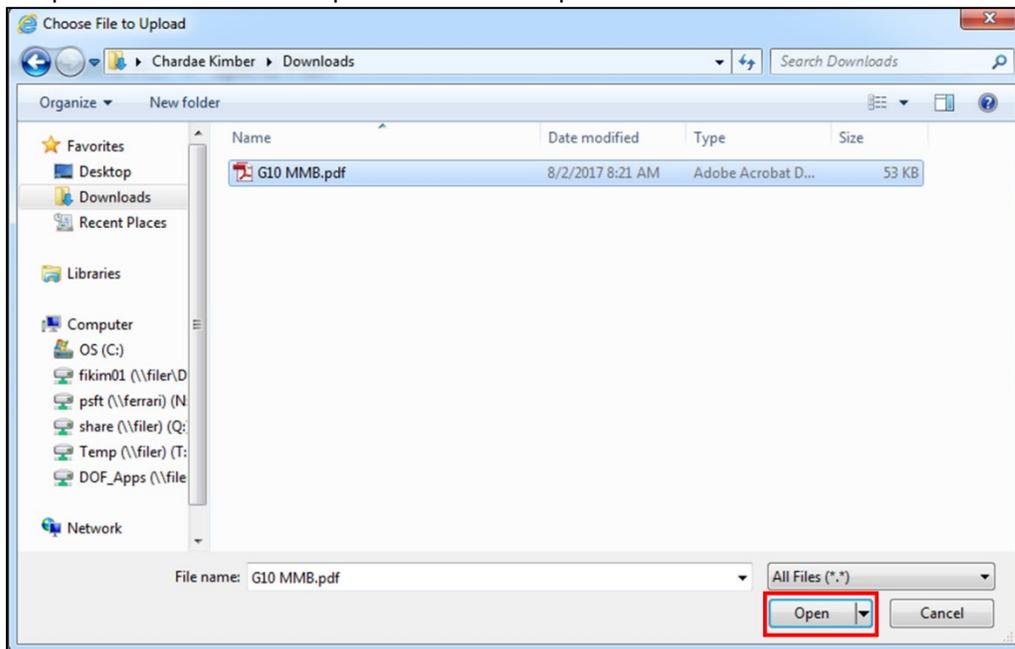
1. Click the folder to which you would like to upload your document and open the folder (Spend Plan folder open in this example)



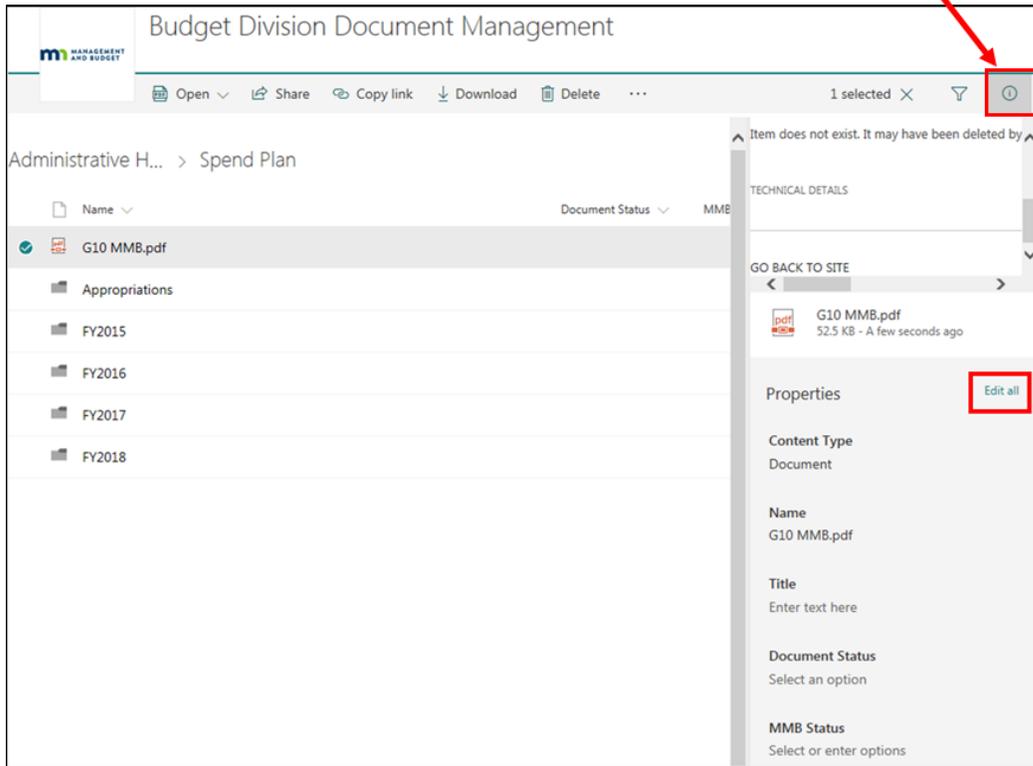
2. Select Upload once you are in the appropriate folder



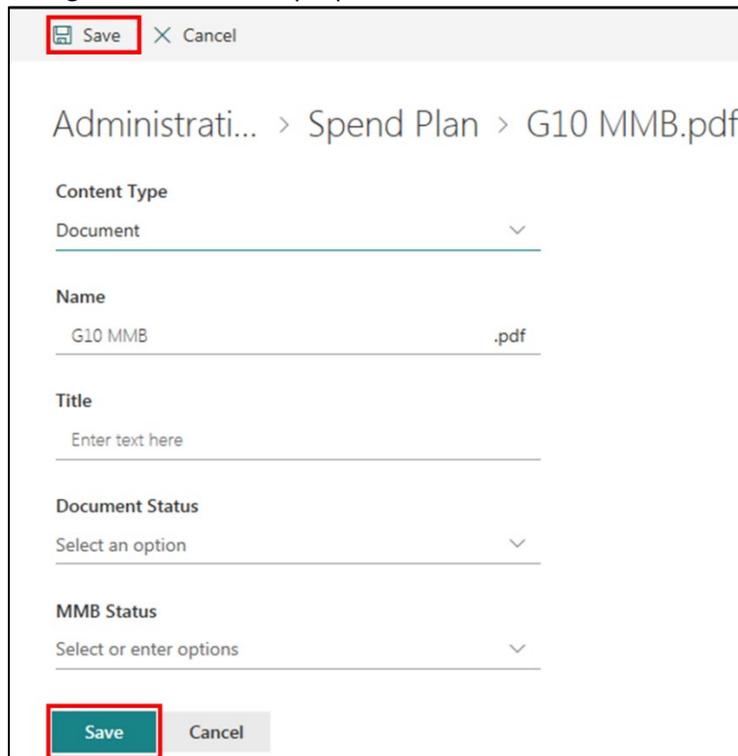
3. The document finder will open allowing you to choose a file to upload. Select the document (s) you wish to upload and then select Open and it will be uploaded.



- 4. The uploaded document properties can be changed by selecting the document and clicking on the Edit All link on the right hand details menu. Note: you may have to open the Details Pane

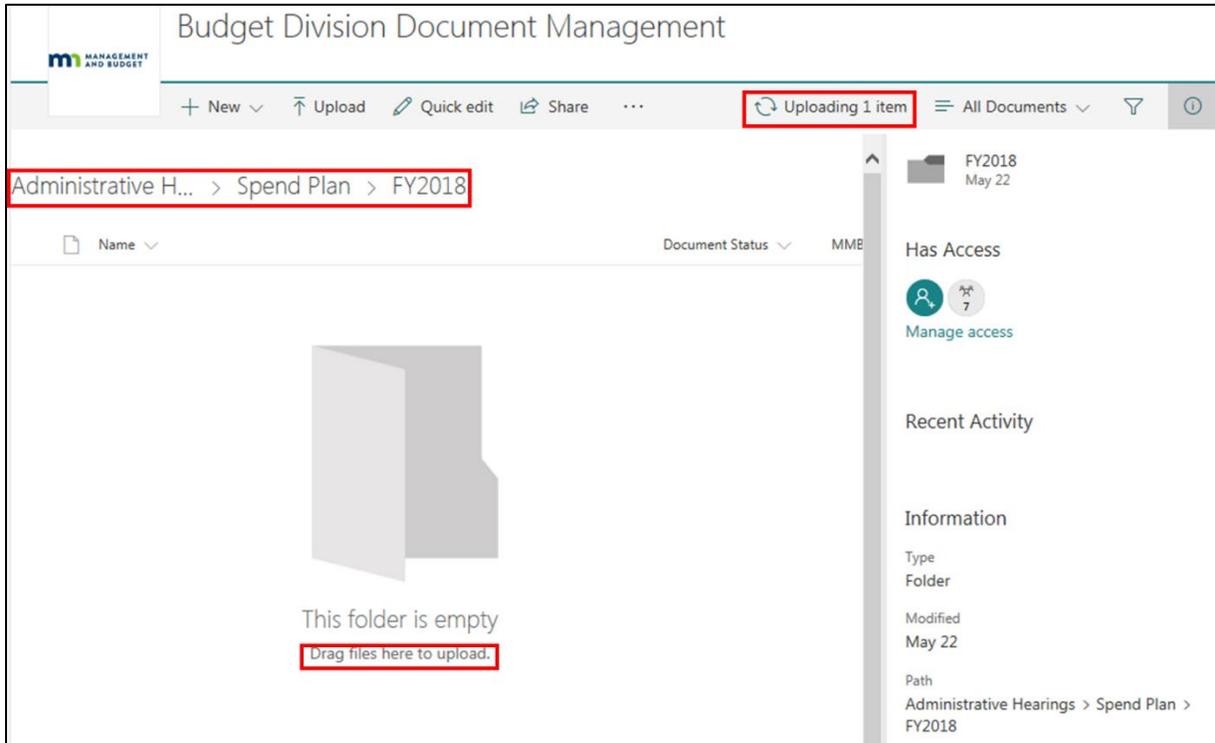


- 5. Change the document's properties then select Save



Uploading Multiple Documents to the SharePoint Site

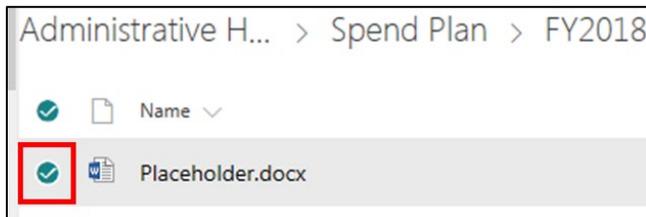
1. Navigate to the folder that you wish to upload your documents to and click on it.
2. Drag your documents to the open folder where it says “Drag files here to upload” (this example shows the FY 2018 folder within the Spend Plan folder).
3. In the top right corner, it will indicate that there is an upload in progress.



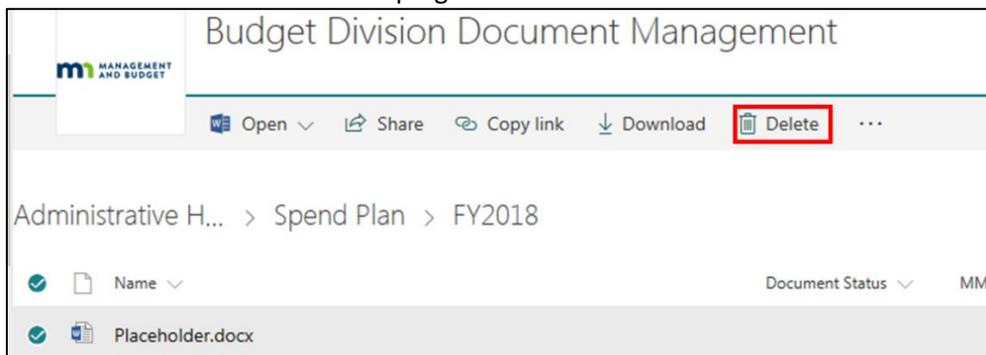
4. Once the upload is complete, the document will appear in that folder.

Deleting a Document

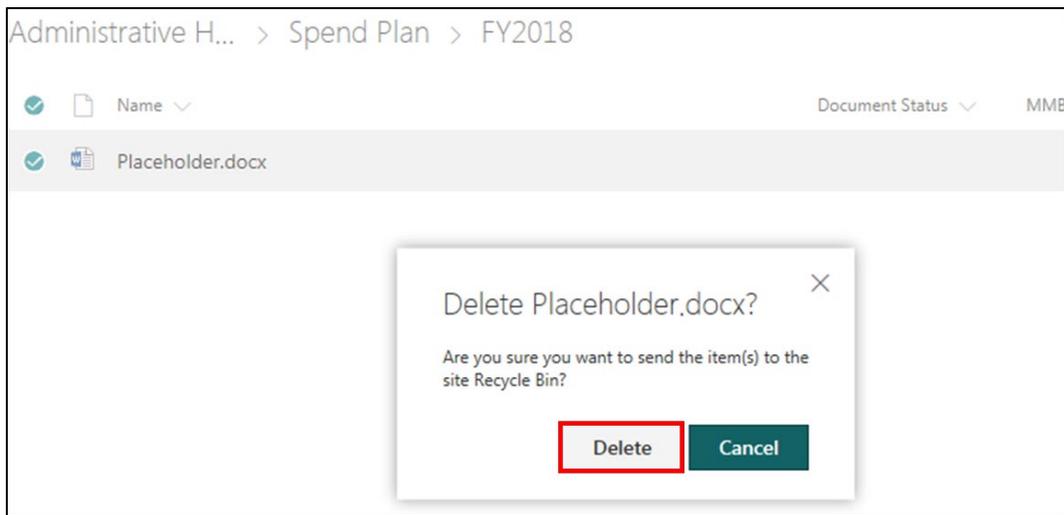
1. Select the checkmark next to the document



2. Select the trash bin icon in the top right hand corner.

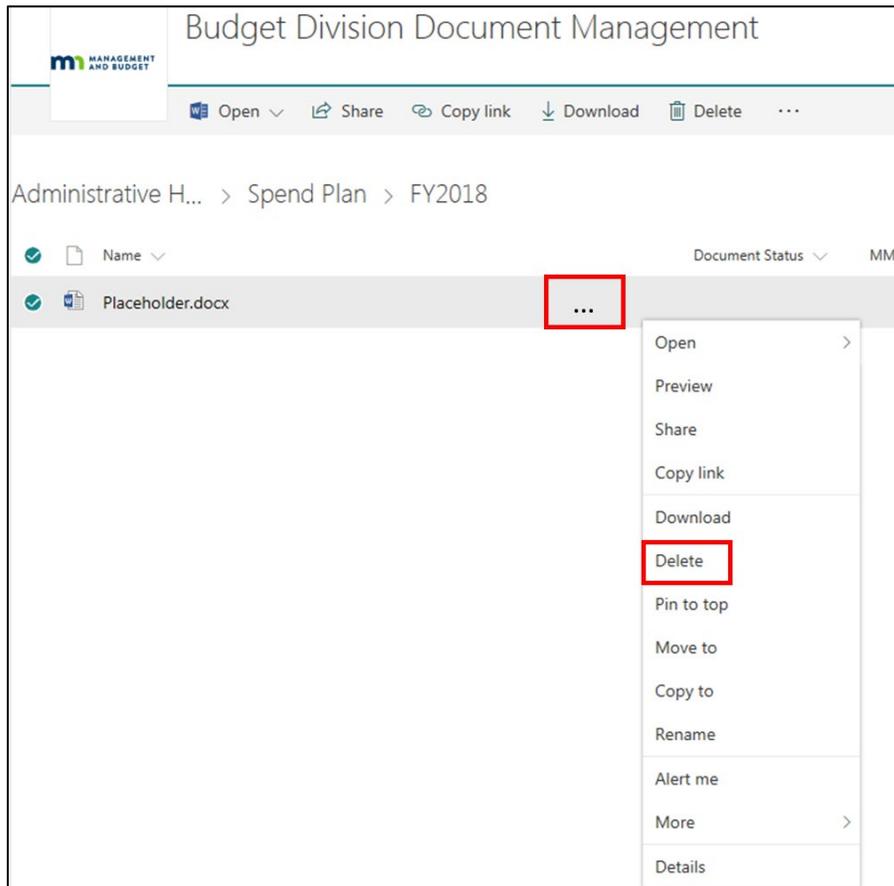


3. A prompt will follow asking if you would like to delete the document, click Delete

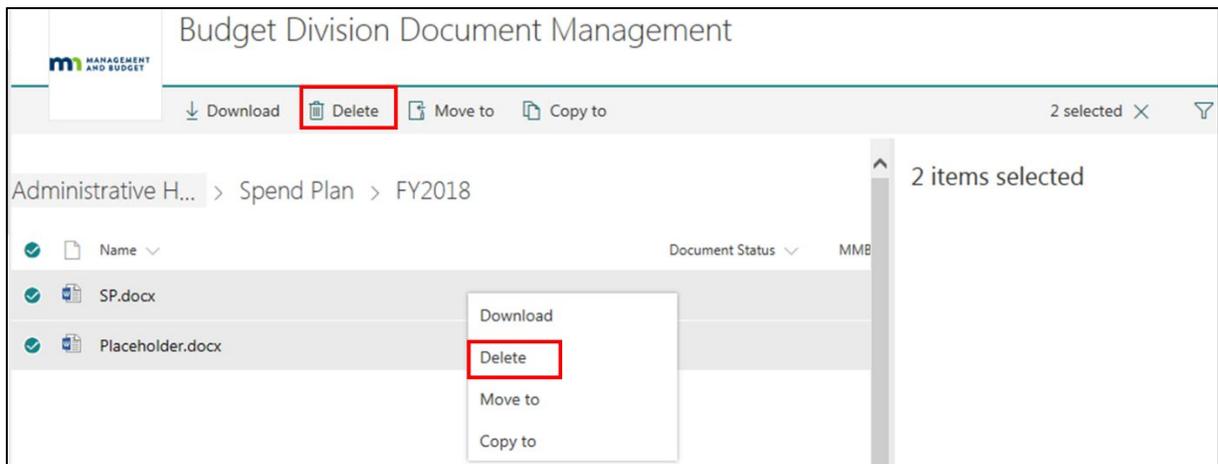


OR

4. Select the ellipsis to the right of the document name, then select the Delete option.

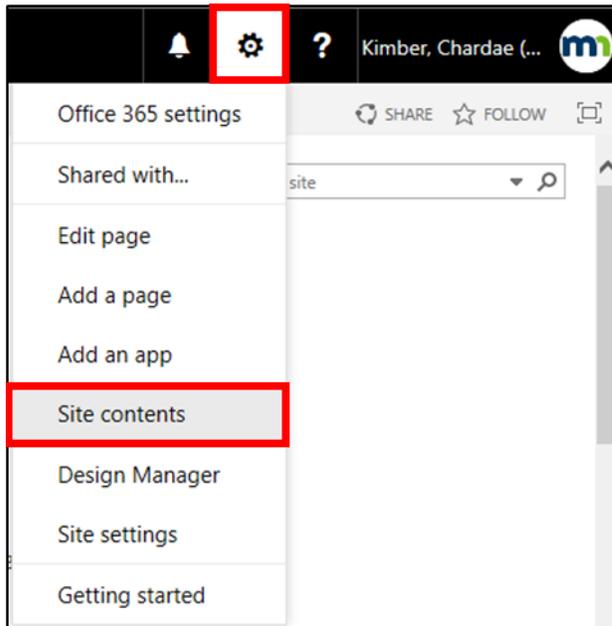


5. For deleting multiple documents, select the documents you would like to delete or use the select all button and either click Delete or right click and select Delete

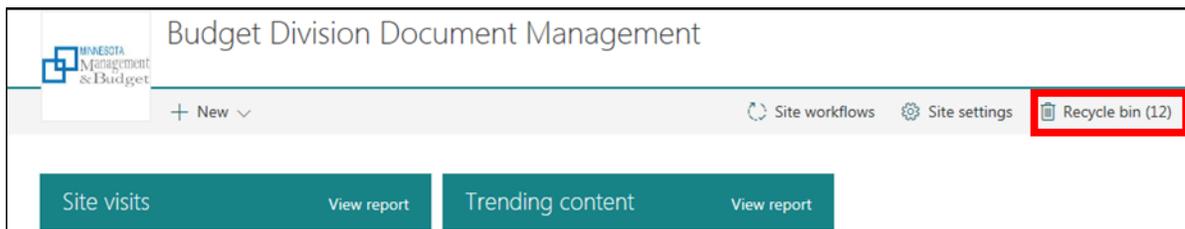


Recovering a Deleted Document

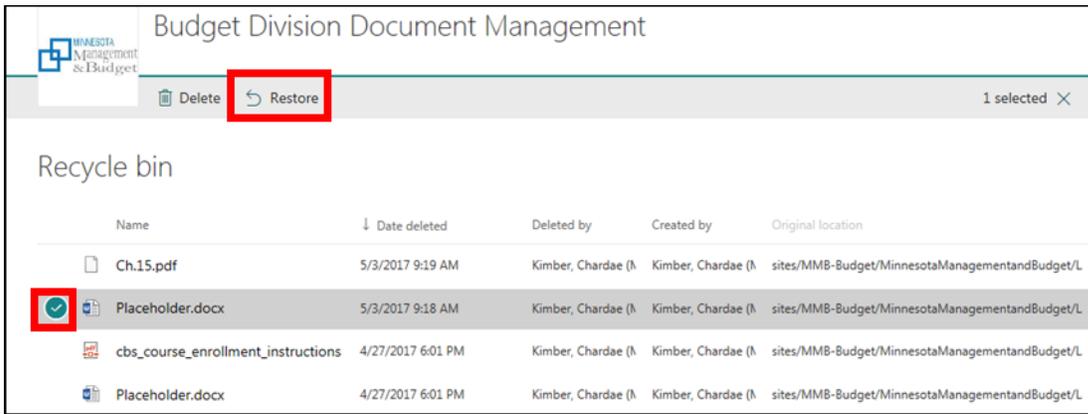
1. Click on the Settings cog on the right hand screen and select "Site Contents" from the drop down menu



2. Select the "Recycling Bin" icon at top right of the page



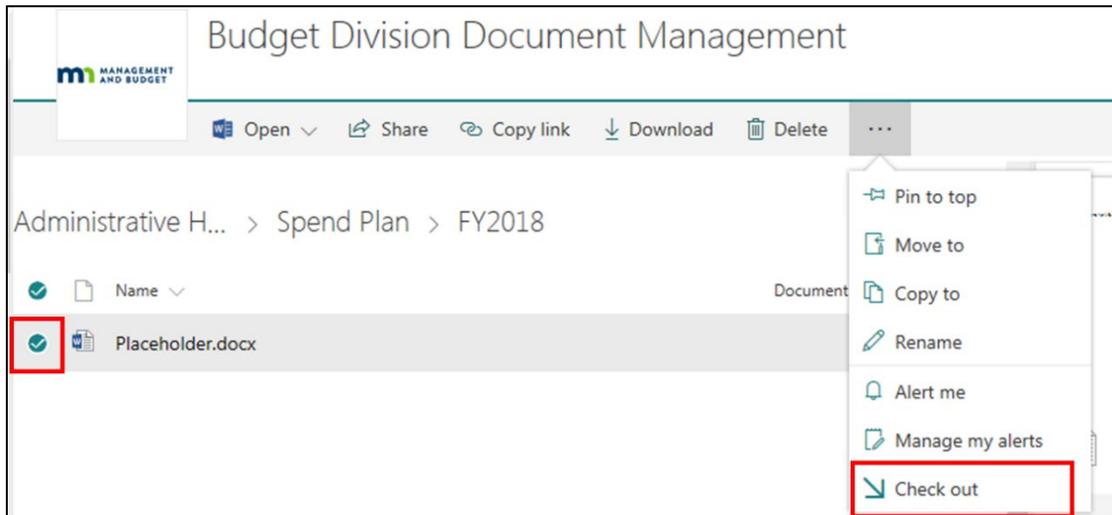
3. Click the check box next to the document you wish to restore and select "Restore"



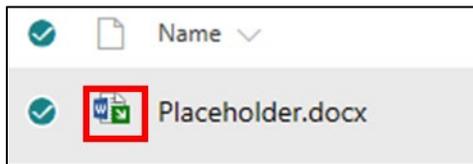
Editing a Document

The best way to ensure that changes to a document are saved properly is to check out the document to edit and check in the document once edits are completed.

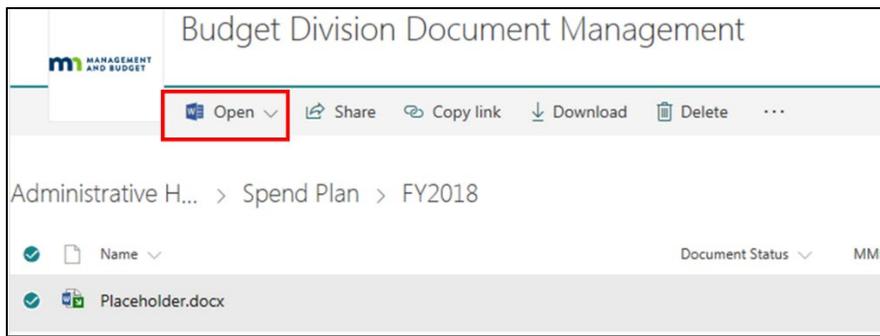
1. Select the checkbox next to the document you wish to edit and click on ellipsis at the top right hand corner. Select Check Out from the drop down menu.



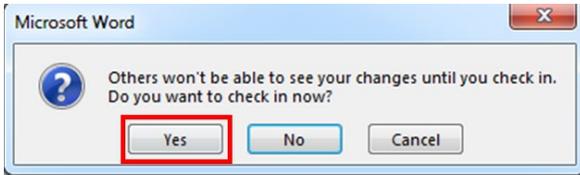
2. SharePoint will indicate in the top right hand corner that the document is being checked out. To ensure that the document has been checked out to you for editing, there should now be a small green arrow at the bottom of the document icon.



3. Click on the document you just checked out and select Open it to make all of your changes.

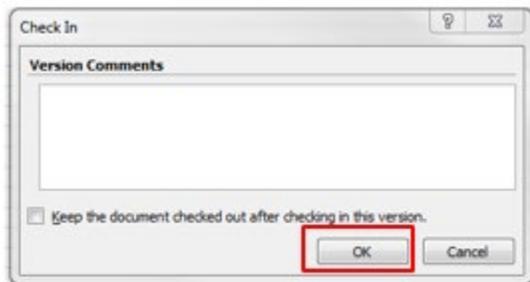


4. Save the document when you are finished editing.
5. Exit out of the document. This will prompt you with a message to check in your document. Select “Yes.”

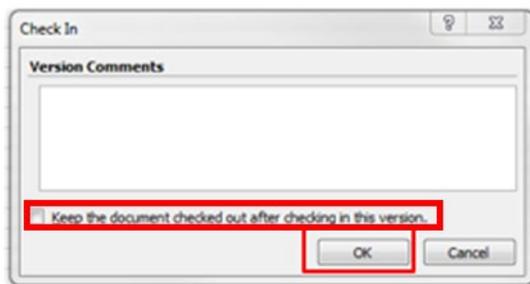


Note: You must check in the document before anyone else can make changes to the file.

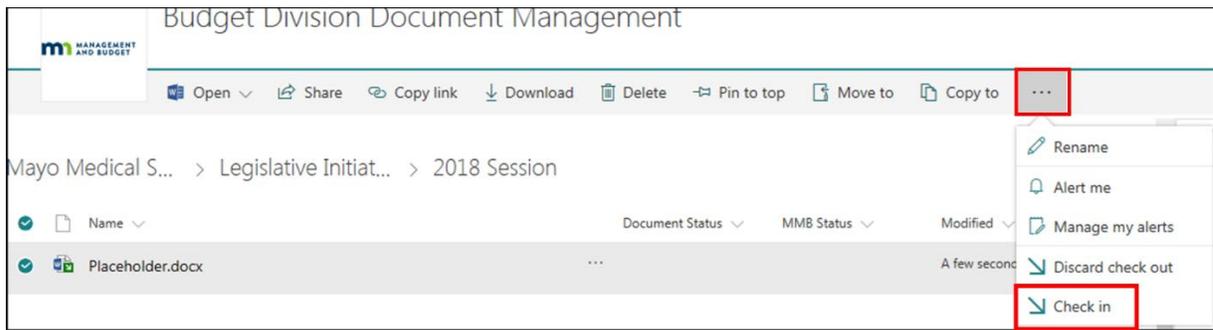
6. A window to add comments will pop up. Version comments are optional, however, you must click “OK” whether you add comments or not in order to check the document back in. If you want to keep the document checked out after making changes, check the box that says “Keep the document checked out after checking in this version.”



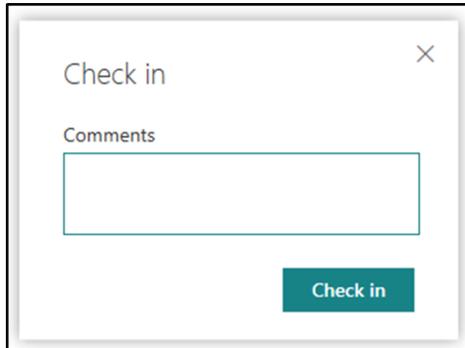
7. The SharePoint page should refresh automatically within a matter of seconds. If not, click F5 to refresh the page. The “Check In” button should no longer be selectable and the green “Checked Out” arrow should no longer be at the bottom of the document.
8. (Optional) Click on name of the file to view and make sure all changes were saved.
9. If you want to keep the document checked out after making changes, check the box that says “Keep the document checked out after checking in this version.” and the OK button.



10. To check the document back in, select the ellipsis and “Check In.”

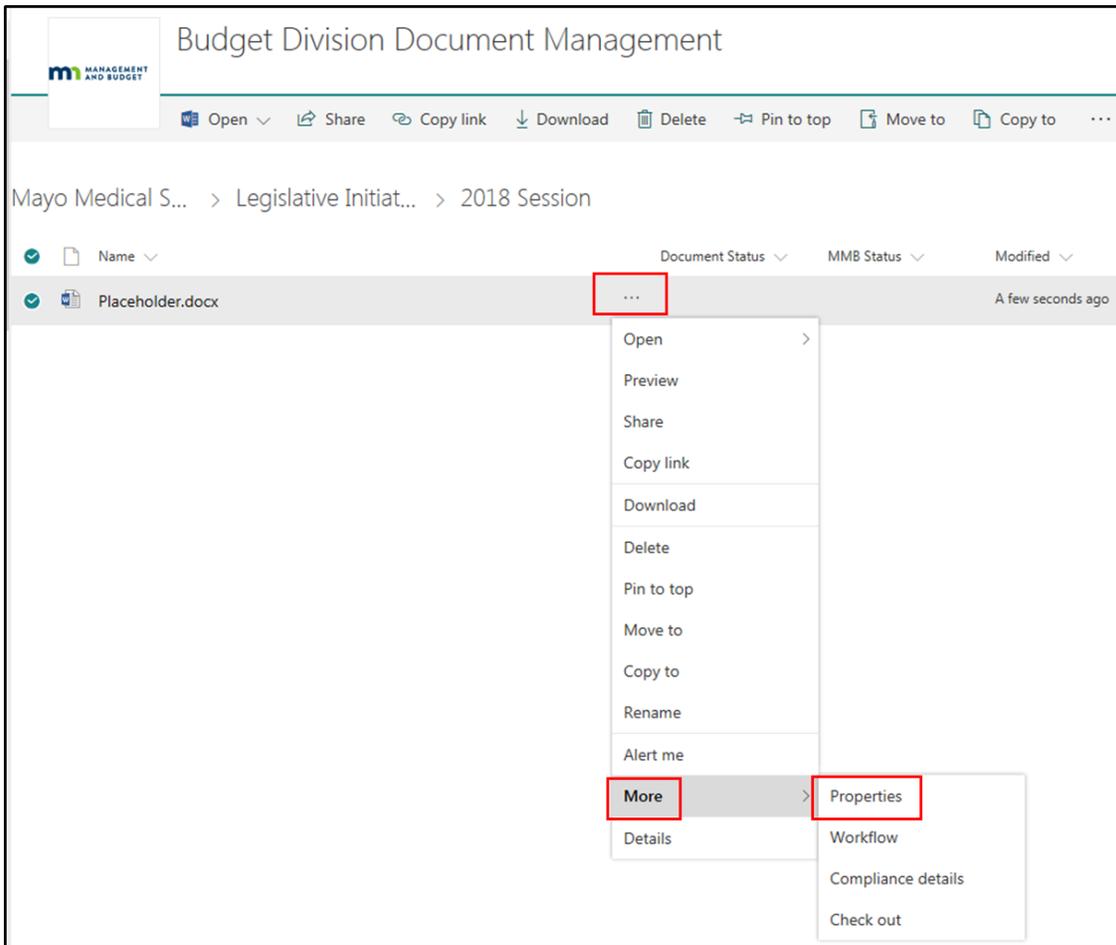


11. Add comments if you wish and click the Check in button.



Editing Document Properties

1. To change the name or status of a document, select the document.
2. Select the ellipsis next to the document name.
3. Select the More option and Properties.



4. A screen will open, select Edit All, which allows you to edit the document properties.



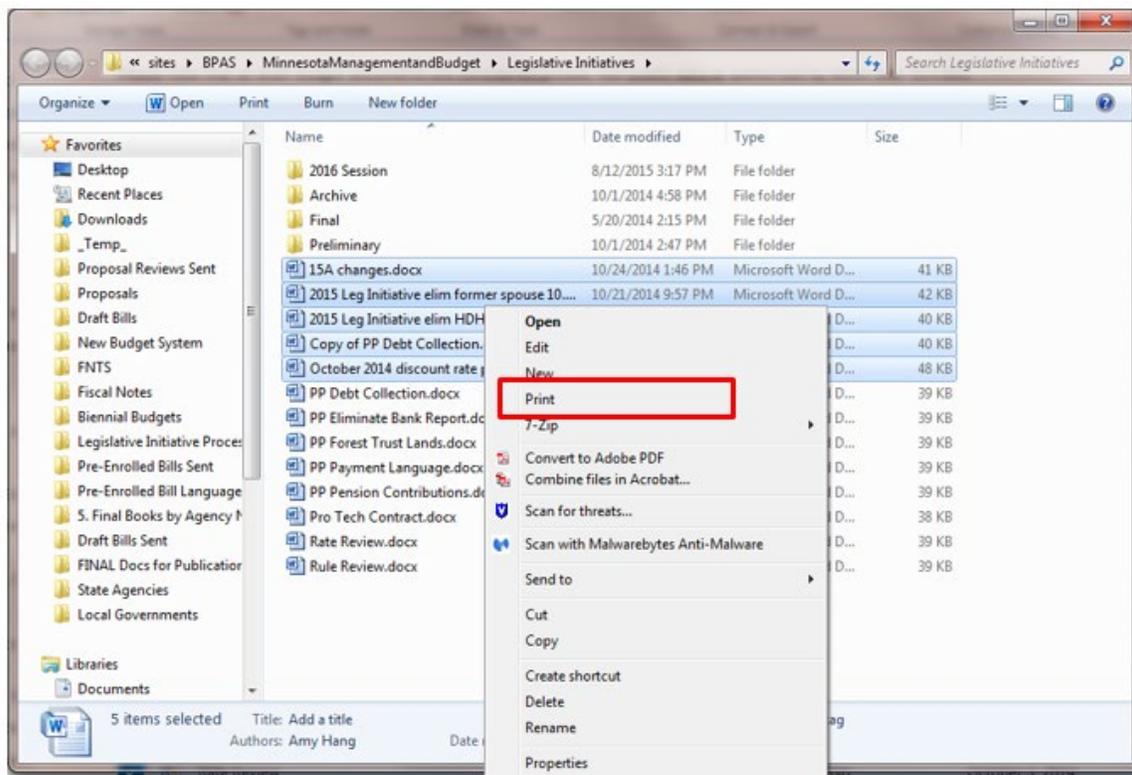
5. Make the appropriate changes and click Save.

Printing Document(s)

1. Navigate to the folder where your documents are located
2. Select the All Document drop down on the right hand side of the screen
3. Select View in File Explorer

Name	Document Status	MMB Status	Modified	Modified By
Archive	May 16, 2014	Drinkwine, Can
Biennial Budget	May 16, 2014	Drinkwine, Can
LAC	May 16, 2014	Drinkwine, Can
Legislative Initiatives	May 16, 2014	Drinkwine, Camille (MN36)
Spend Plan	May 16, 2014	Drinkwine, Camille (MN36)

4. Select the documents you wish to print, right click, and select "Print."

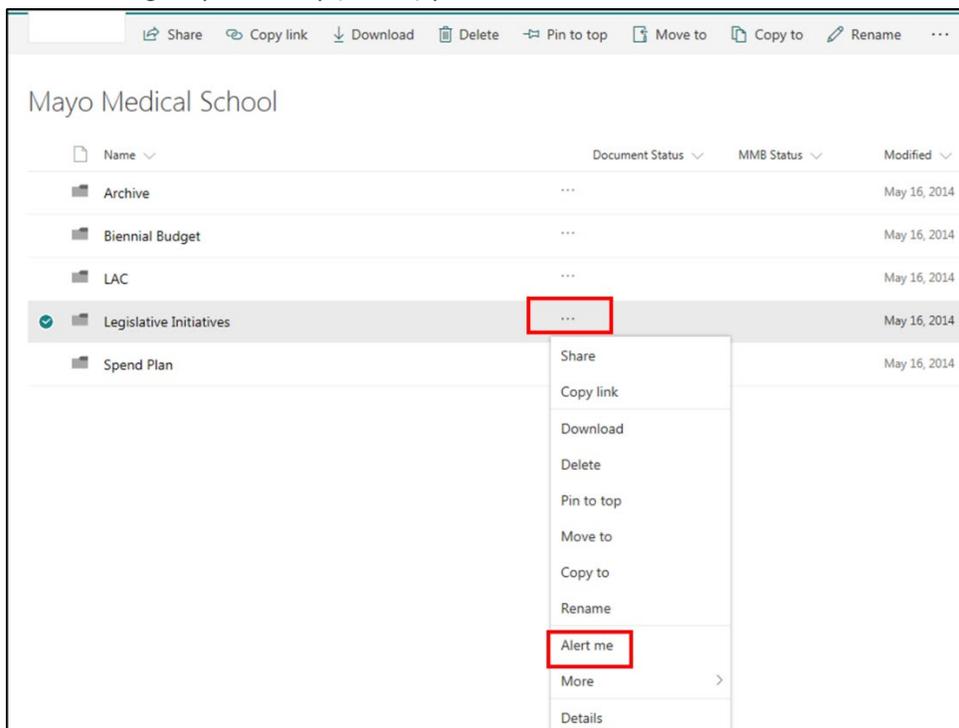


5. Close the window when you have finished printing by clicking on the “X” in the upper right hand corner of the screen.

Alerts Notifications

Users can set up email notifications from this SharePoint site when changes are made to any agency library.

1. Select the agency or library (folder) you wish to receive notifications for.



2. Select the ellipsis next to the right of the name.
3. Select Alert Me
4. Select your alert preferences:
 - a. Send Alerts To
 - b. Delivery Method
 - c. Change Type
 - d. Send Alerts for These Changes
 - e. When to Send Alerts
5. Click the OK button in the bottom right corner of the screen.

Alert me when items change

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Delivery Method
Specify how you want the alerts delivered.

Change Type
Specify the type of changes that you want to be alerted to.

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

When to Send Alerts
Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)

Users:
Rupp, Robyn (MMB) x

Send me alerts by:

E-mail robyn.rupp@state.mn.us
 Text Message (SMS)
 Send URL in text message (SMS)

Only send me alerts when:

All changes
 New items are added
 Existing items are modified
 Items are deleted

Send me an alert when:

Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me

Send notification immediately
 Send a daily summary
 Send a weekly summary

Time:
Thursday 10:00 AM

OK Cancel

Manage Alerts

To manage your alerts on your libraries (folders).

1. Click on the ellipsis
2. Select Manage my alerts

Budget Division Document Management

MANAGEMENT AND BUDGET

+ New Upload Quick edit Share Copy link Sync Download ...

Mayo Medical S... > Legislative Initiatives

Alert me
Manage my alerts

Name	Document Status	MMB Status	Modified
2015 Session	Agency Preparation		August 19, 2015
2016 Session			August 12, 2015
2017 Session			June 28, 2016
2018 Session			July 27

3. Select alerts to delete by clicking the check box next to the library.
4. Click on "Delete Selected Alerts."
5. Alerts can also be added through this screen.

Budget Division Document Management EDIT LINKS

My Alerts on this Site

Add Alert Delete Selected Alerts

Alert Title

Frequency: Daily

- Behavioral Health and Therapy Board
- Administration Department
- Public Employees Retirement Association
- MNSure
- Transportation Department

Appendix A: Non-MNIT Network Users (External Users)

Microsoft Accounts

When collaborating with external partners, the State of MN often uses Microsoft Office 365 services. If you are reading this, you probably received an email invitation with a link to a State of MN collaboration website. The invitation was sent to a specific email address that the State of MN and Microsoft will use to verify your identity.

To access the website, you will need a **"Microsoft Account" that is associated with that email address**. No other email address will work.

- If your partner at the State of MN sent the invitation to the wrong email address, inform them of the mistake and ask them to send a new invitation to the correct address.
- There are two types of Microsoft Accounts that can be associated with an email address: work and personal. You will use the type associated with the email address to which your collaboration invitation was sent.

If your employer uses Office 365

If your employer uses Microsoft Office 365 services, your work email address is also a Microsoft Account:

- Access your employer's Office 365 services by logging into <https://portal.office.com>.
- Use the same web browser session to follow the invitation link. Because your work email address is also a Microsoft Account, you will have direct access to the website and can stop reading here.

If you have a personal Microsoft Account

If your employer does NOT use Microsoft Office 365 services AND you already have a personal Microsoft Account:

- Follow the invitation link and enter your existing personal Microsoft Account email address and password.
- Remember, the email address used for the invitation must match the email address of your personal Microsoft Account. You will then have direct access to the website and can stop reading here.

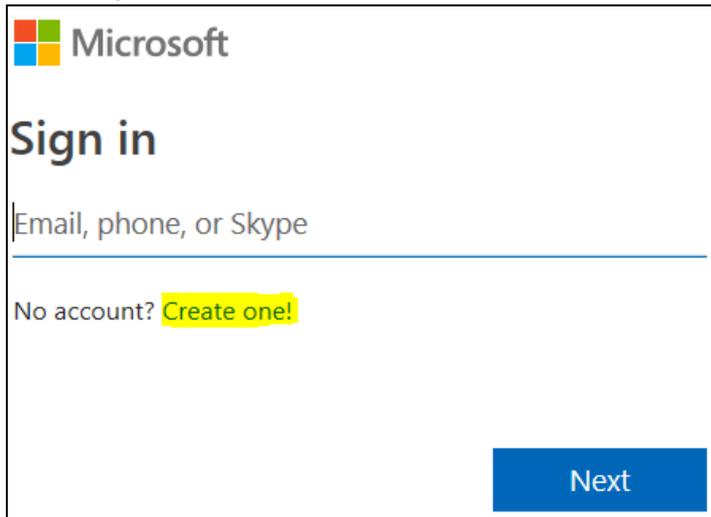
Create a new Microsoft Account

If your employer does NOT use Microsoft Office 365 services, and you DON'T have a personal Microsoft Account, you will need to create a Microsoft account.

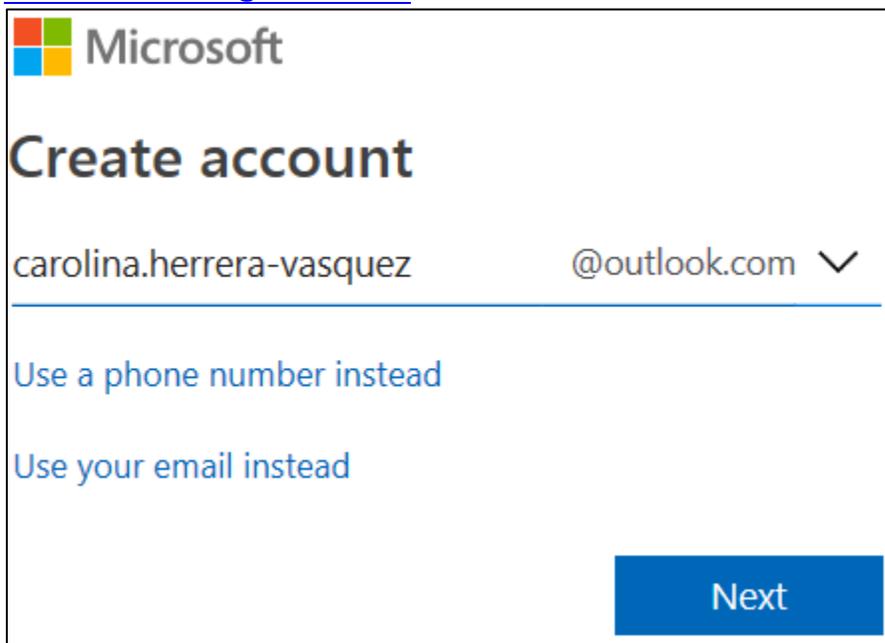
- A Microsoft Account associates your email address with a password you create. This allows the State of MN to collaborate with you (the email account owner), and ensures that the information we share is well protected.
- Personal Microsoft Accounts are free. You can use any email address (including Gmail, Yahoo, AOL, etc.) and you don't need to divulge your email account password. For a personal Microsoft Account, the username is your email address and the password is anything you chose.
- Microsoft will confirm you own the account by sending verification messages to the email address. Remember, the email address used for the invitation must match the email address of the personal Microsoft Account you create. NOTE: Microsoft has recently added SMS messaging to validate accounts.

- After verification, Microsoft and the State of MN trust that you are the only person who can see information shared with that Microsoft Account. It puts you in control of the account and your personal information. There is no obligation to sign up for any additional Microsoft services. You can learn more about Microsoft Accounts at <https://account.microsoft.com/>.

1. Go to the Office365 Portal website: <https://portal.office.com>
2. On the Sign in screen, select the text No account, [Create one!](#)



3. Fill out the fields to create a new account. Use the following naming convention: [firstname.lastname@outlook.com](#) in the "Create account" field. Click next and enter in a password.



4. Microsoft may require a valid phone number that can receive an SMS text message. Much like google, Microsoft uses a cell phone for account security purposes. If changes are made to this account, Microsoft will use the cell phone number to contact you. Enter a valid phone number and click Send Code. Once you receive the code, enter the access code and click next:

Add security info

When you need to prove you're you or a change is made to your account, we'll use your security info to contact you.

We'll text you the code you'll use to verify your phone number.

Country code

United States (+1) ▼

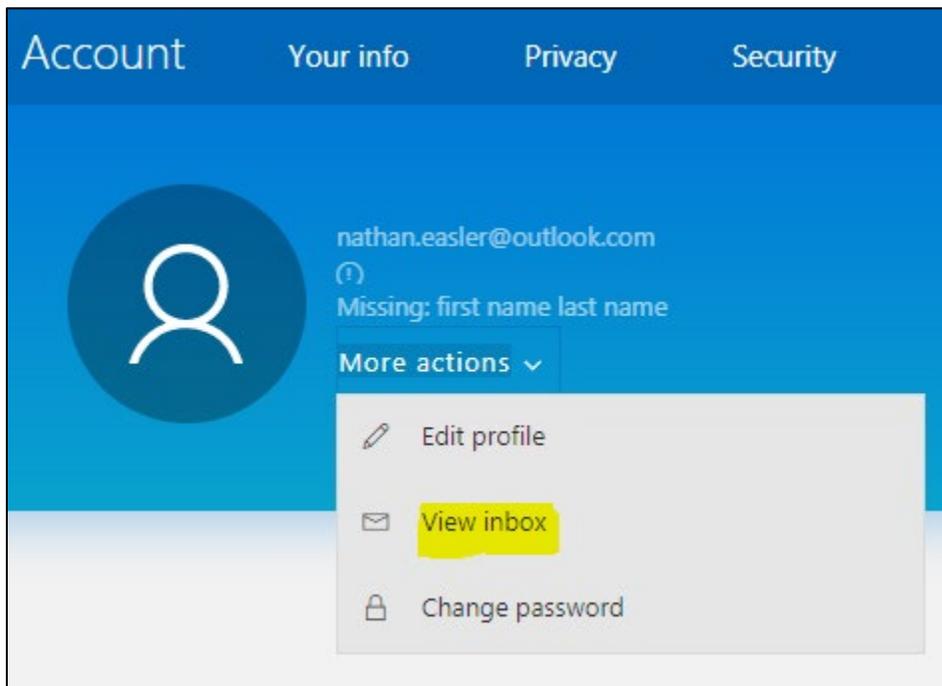
Phone number

I didn't get a code

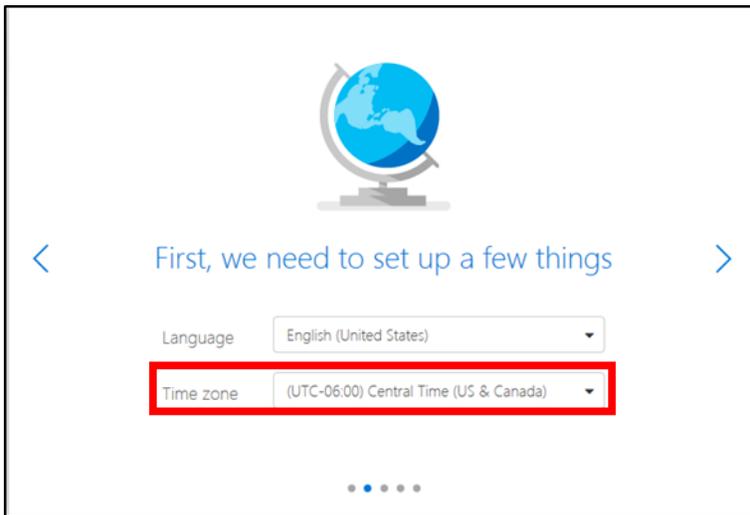
Enter the access code

Next

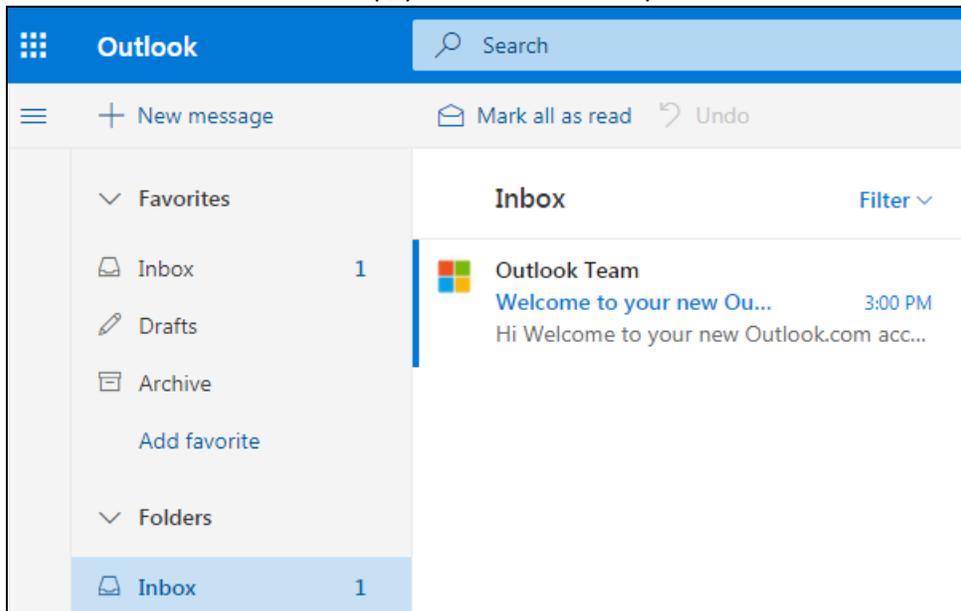
- You have now created an Office 365 account with Microsoft. The next step is to set up your inbox so you may receive the invitation to SharePoint. Select More actions from the drop down and choose view inbox:



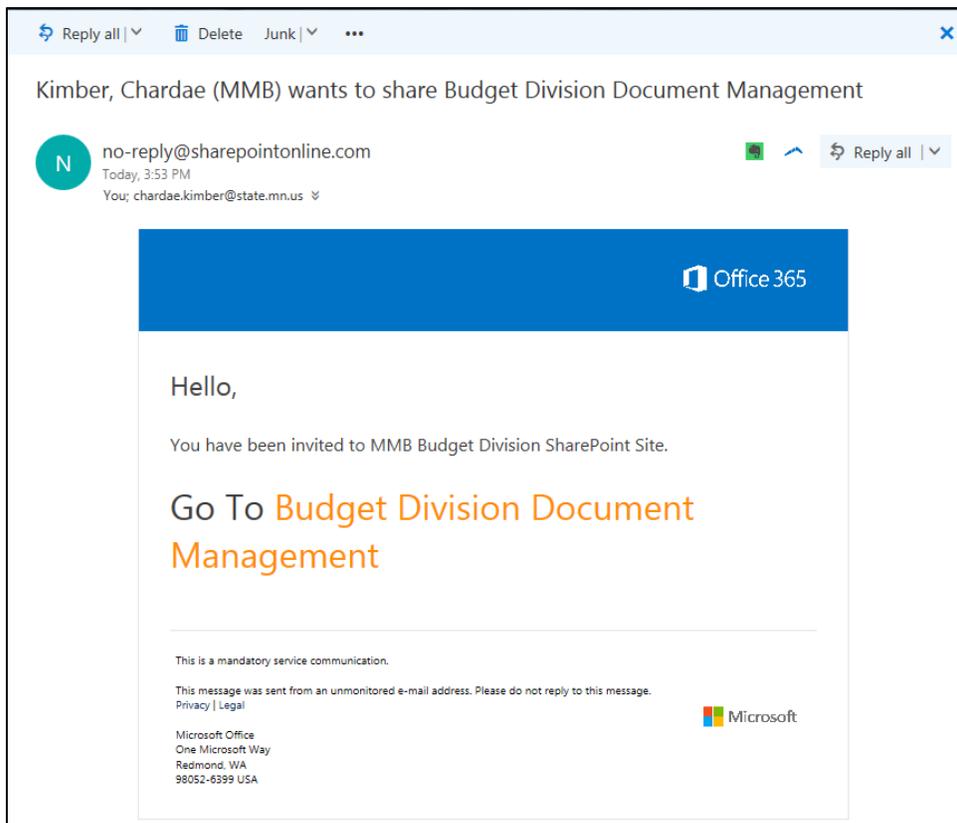
- Check the Time Zone to Central Time.



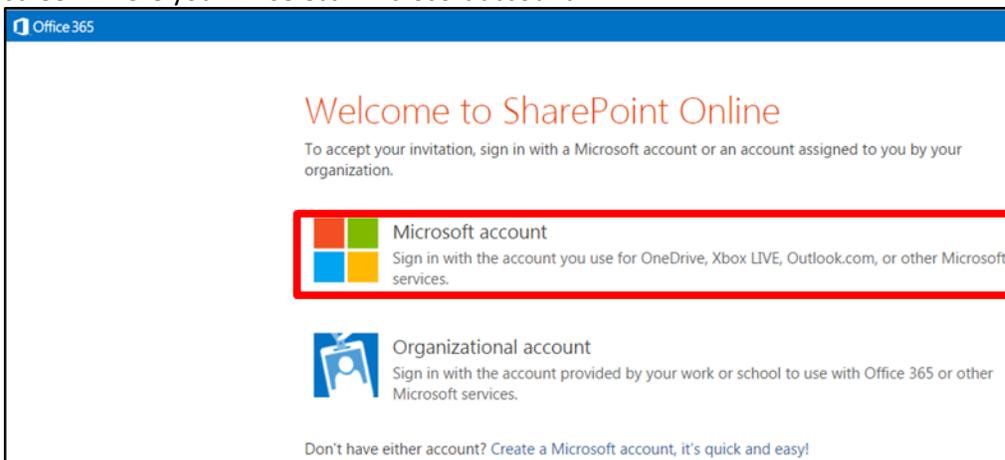
7. Once the email account is set up, you will be taken to your inbox:



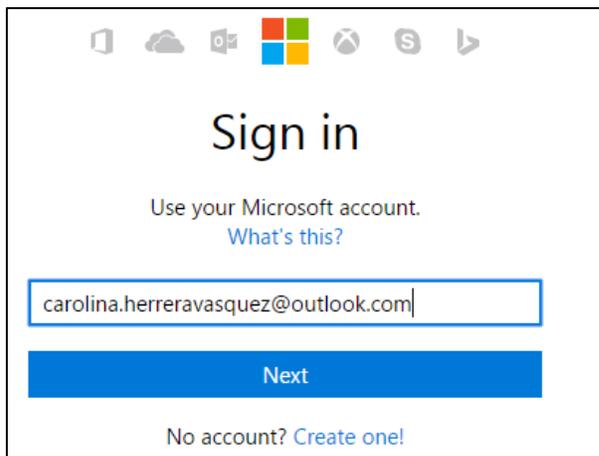
8. Send MMB your email address (firstname.lastname@outlook.com) and Budget Operations will send you an invitation for your agency to this email address.
9. If you are not already, be sure to log into your Microsoft account: <https://portal.office.com>
10. Click on the email that you receive from MMB Budget Operations and it will direct you to the MMB Budget Division SharePoint Site.



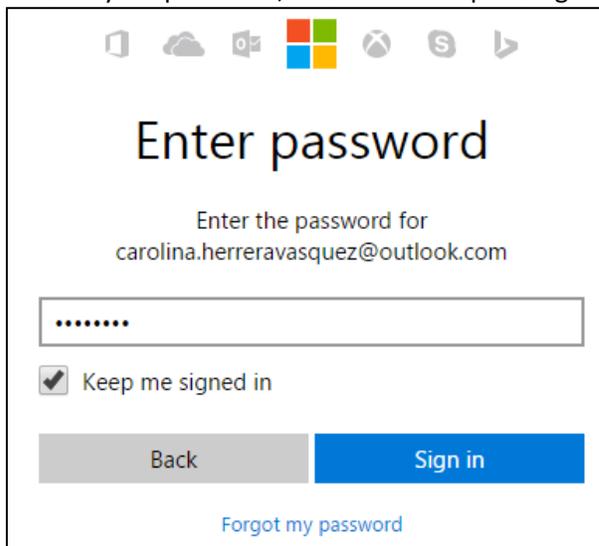
11. Once you select the website from the email, it will bring you to a “Welcome to SharePoint Online” screen where you will select “Microsoft account.”



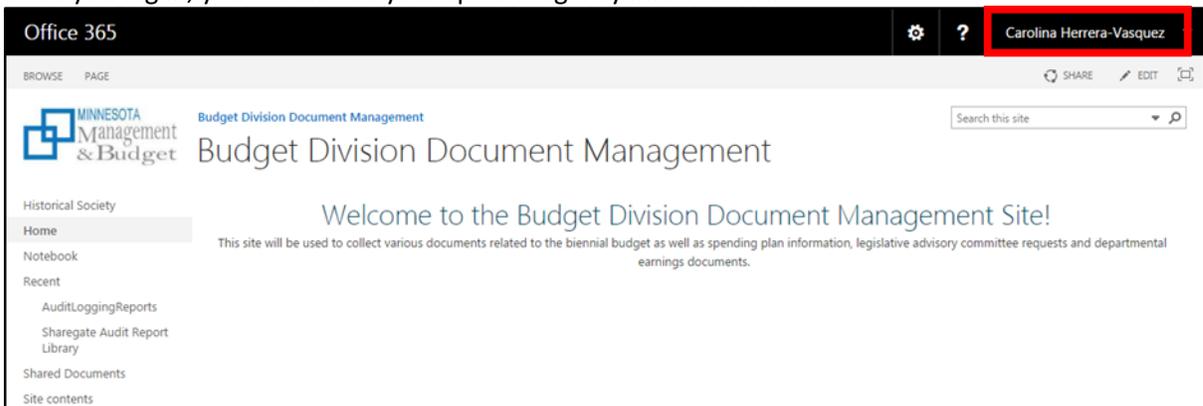
12. Sign in using your Microsoft Outlook email address.



13. Enter in your password, select the “Keep me signed in” button, then select “Sign in.”



14. Once you log in, you should see your specific agency information.



For additional information, please see the Microsoft External Partner Accounts document [here](#).

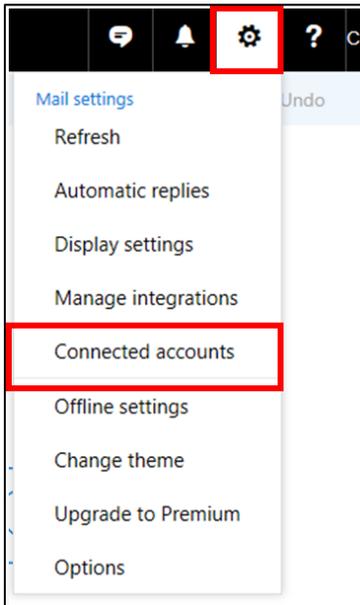
Need help?

Contact Microsoft directly if there are problems with your Microsoft Account. If your account appears to be working correctly, but you can't collaborate with partners at the State of MN, contact budget.finance.mmb@state.mn.us and ask to verify that you are both referring to the same email address when sending and accepting collaboration invitations.

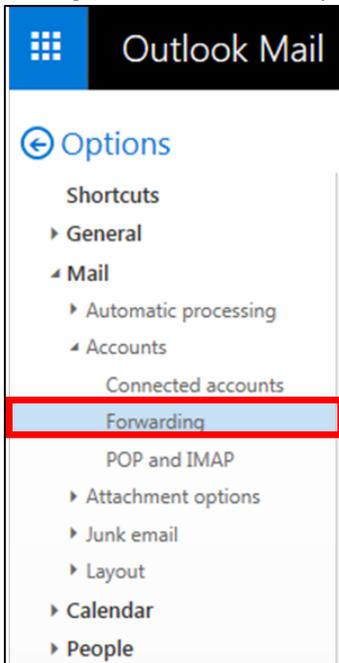
Alerts

If you plan on setting an alert for any folders in your library, the notification will be sent to your Microsoft account email. In order to redirect these emails, you will need to forward all emails to your employee email address.

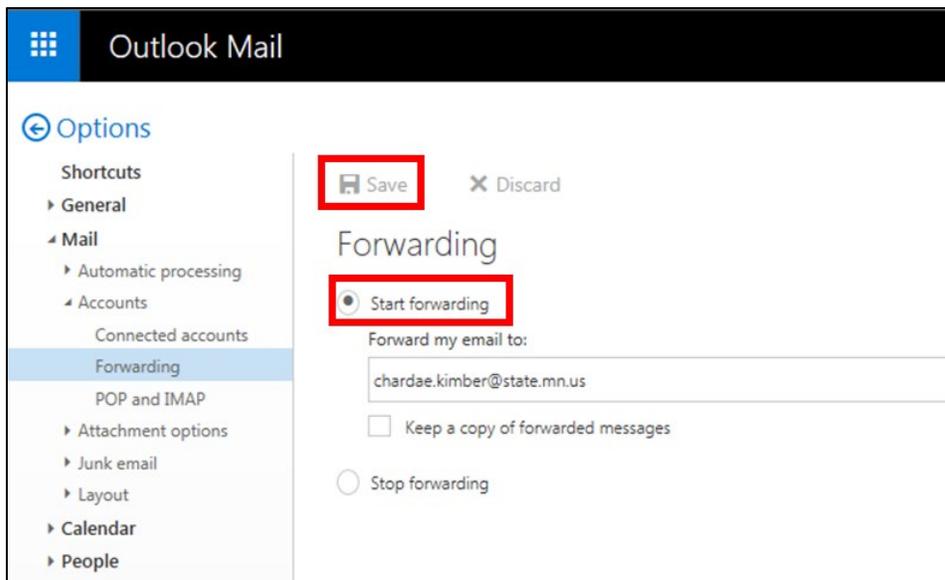
1. In your Microsoft account email, go to your inbox and select the Settings cog in the top right hand side and select Connected Accounts



2. The right hand menu will open the Accounts tab, select the section titled Forwarding



3. Select Start Forwarding and enter your employee email address, then hit Save at the top



4. This will ensure that any emails you receive due to alerts from the SharePoint site will be sent to your employee email address. You can then set up a rule in your Outlook mail that places all emails that are forwarded from your Microsoft account into a separate folder in your inbox.