Using the Budget Division Document Management SharePoint Site for Budget Document Submission

I.   Establishing User Access

Each agency has an agency secured folder on the SharePoint site. Agency staff will need to request access to the site by submitting a Budget System User Authorization Form. Completed forms should be submitted to Budget.Finance.MMB@state.mn.us. Access is granted to agency users based on two types of access, Agency or Agency Legislative Initiatives. Please contact MMB if there are questions on which access a user may need.

Questions related to the use of SharePoint for submission of documents should be directed to your executive budget officer (EBO) or emailed to Budget.Finance.MMB@state.mn.us

II.   Narrative Templates

All narrative templates can be found on MMB's website (http://www.mn.gov/mmb/budget/budget-instructions/bibudprep/)
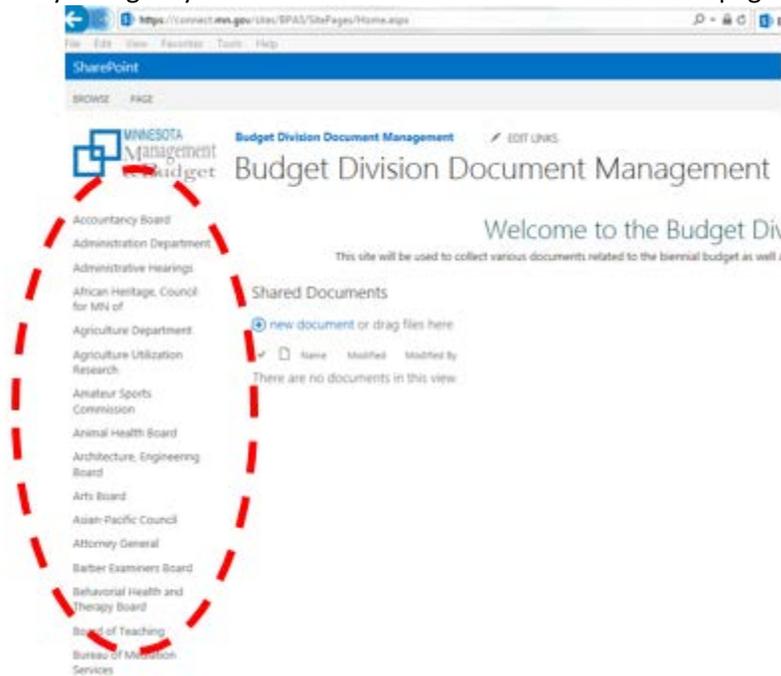
III.   Instructions

Agencies should submit their budget documents by uploading their completed documents to the MMB Budget Division Document Management SharePoint site, as instructed in the Biennial Budget Instructions. Please remember that once something has been posted to SharePoint, MMB considers this document as the final agency submission. If agencies have corrections or changes needed to a document, which has already been uploaded to SharePoint, they will need to work with their EBO to have those changes made.

For more instructions on SharePoint functionality, refer to the SharePoint Reference Guide

Uploading a Document to SharePoint

1. Select your agency from the menu on the left-hand side of the page.

2. Select the Biennial Budget Folder

3. Select the 2018-19 Biennial Budget Folder

4. Select the Narratives Folder. This is the folder where agencies will upload their final submitted budget narratives. Also within the Narratives folder is a folder called Reference Materials that has information which will help agencies prepare their

narratives, i.e., 2016-17 published budget narratives and 2015 spending information for the Agency Profile pie and bar charts.

Budget Division Document Management   ✎ EDIT LINKS

Biennial Budget · 2018-19 Biennial Budget

Please note that all draft budget documents are considered private, non-public data as authorized by Minn. Stat. §13.605.

⊕ new document or drag files here

All Documents   ··· | Find a file   🔍 |

✓	🗋	Name	Document Status	MMB Status	Modified	Modified By
	📁	Narratives ···			April 26	🟩 Jaclyn S Miller

5. Select the New Document button

Budget Division Document Management   ✎ EDIT LINKS
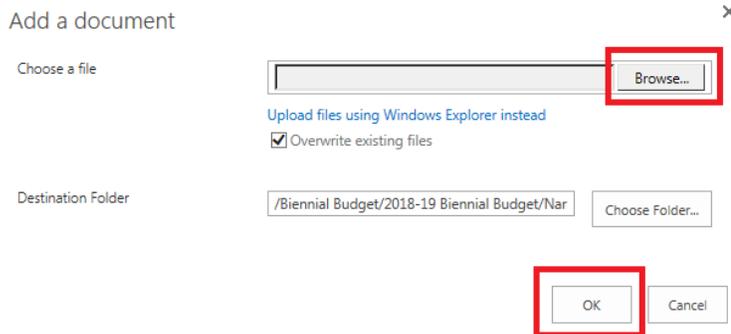
2018-19 Biennial Budget · Narratives

Please note that all draft budget documents are considered private, non-public data as authorized by Minn. Stat. §13.605.

⊕ new document or drag files here

All Documents   ··· | Find a file   🔍 |

✓	🗋	Name	Document Status	MMB Status	Modified	Modified By
	📁	Reference Materials ···			May 2	🟩 Jaclyn S Miller

6. Select the browse button to search your computer for the document you wish to upload to the SharePoint site. Select ok.

Add a document   ✕

Choose a file		[ ] [Browse...]
		Upload files using Windows Explorer instead
		☑ Overwrite existing files
Destination Folder		[/Biennial Budget/2018-19 Biennial Budget/Nar] [Choose Folder...]

[OK]   [Cancel]

7. SharePoint will bring you to the document properties menu. Please verify that the name listed in the Name box, is using the naming convention listed below for the document you are uploading.

Naming conventions for the templates are as follows:

Template	File Name when Saving the Document to SharePoint
Agency Profile	2018 Agency Profile
Program/Activity Template	SWIFT Program/Activity Number-Name of Program or Activity

8. Once you have verified that you have the correct naming convention format for the document being posted to SharePoint, click Save. No other information will need to be entered on this screen.

9. Selecting Save will upload your document to the document library

For more instructions on SharePoint functionality, refer to the [SharePoint Reference Guide](#)