

Minnesota Management & Budget

Using SharePoint

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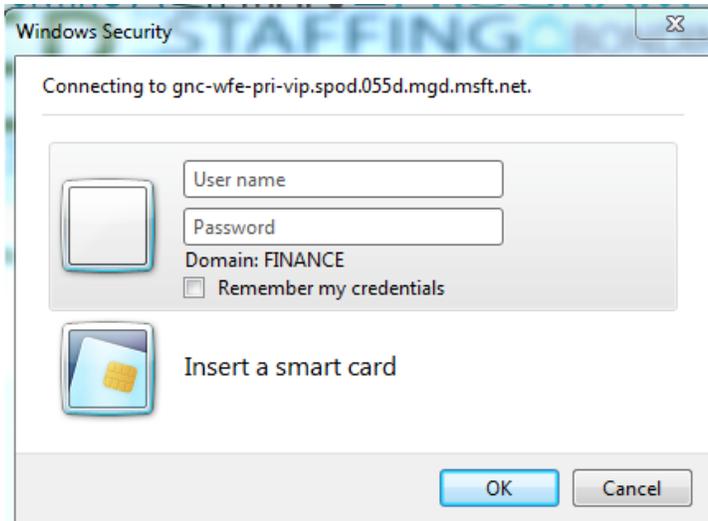
SharePoint Access, Login and Assistance

Access

Request access to the Budget Division Document Management website with the [SharePoint Access authorization form](#) and email to budget.finance.mmb@state.mn.us

Login

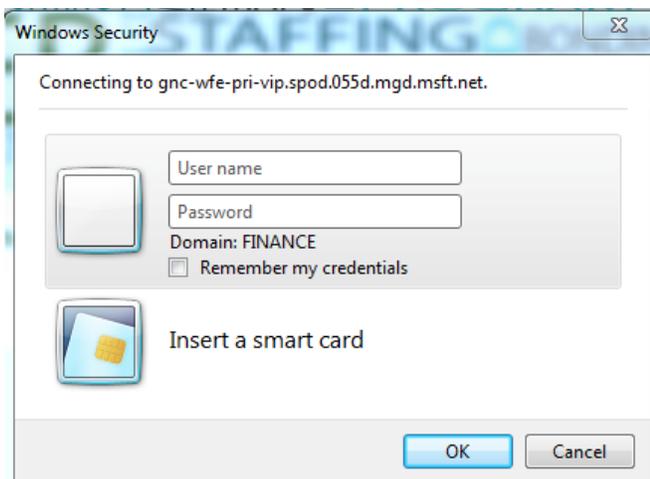
The SharePoint site is available at: <https://connect.mn.gov/sites/BPAS/SitePages/Home.aspx>. Once you click on the link, it may require you to login with a user id and password. You will see a box pop up:



Follow the instructions below if you are currently on the MNIT Network or Not on MNIT Network.

MNIT Network Users

You will be a MNIT Network User if your email has "@state.mn.us" in your email address. These are also the people who currently show up in the Outlook Global Address List. To login, please use your Network (Computer) User Name and Password. You will also notice that your Domain will be listed below the user Name and Password fields. This box may continue to pop up as you navigate through the site, it does not always remember your credentials even if you select the check box on this screen.



Non-MNIT Network Users (Partner Accounts)

Partner accounts is a term used to describe accounts created by MNIT in a special domain called “partner”. They are required when a user who needs access to a MNIT-hosted SharePoint site and is not part of the Outlook Global Address List.

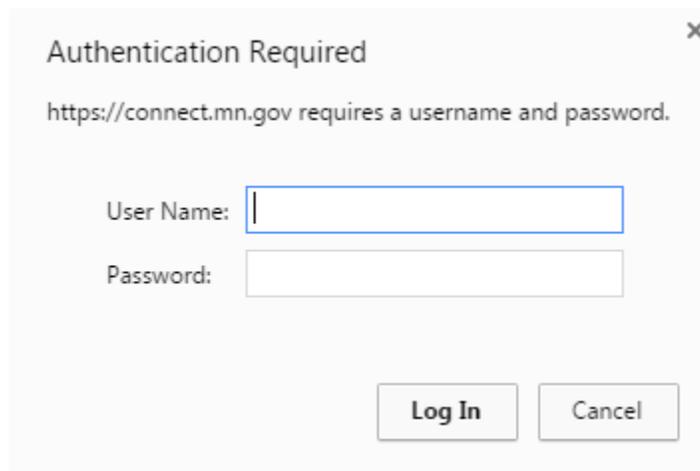
MNIT creates the account and sends the login ID and password directly to the new user via encrypted email. Typically, the username is the first initial and full last name of the end user.

Example: Brian Cranston would be “partner\bcranston”.

KNOWN ISSUES

End users may experience difficulty if they have set their default web browser to Internet Explorer. When they click the link in the email, it will open in IE and pass their local login ID and password to the site because of the user integration embedded in IE. This will fail because the SharePoint site doesn’t “see” that user as being authorized to login.

To get around this, copy the SharePoint link and paste it into another web browser’s address bar – Firefox and Chrome are the usual alternatives available. In doing this, the end user will be prompted to enter credentials, such as this example in Chrome:



PLEASE NOTE:

Bcranston ← **INCORRECT**
partner\bcranston ← **CORRECT**

If you need your password reset, please contact budget.finance.mmb@state.mn.us.

Assistance

Please email the MMB Budget Operations email box at budget.finance.mmb@state.mn.us if you have any 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

1. Accountancy Board
Administration Department
Administrative Hearings
Agriculture Department
Agriculture Utilization Research
Amateur Sports Commission
Animal Health Board
Architecture, Engineering Board
Arts Board
Asian-Pacific Council
Attorney General
Barber Examiners Board
Behavioral Health and Therapy Board
Black Minnesotans Council
Board of Teaching
Bureau of Mediation Services
Campaign Finance Board
Capitol Area Architect
Center for Arts Education
Chicano Latino Affairs Council
Chiropractic Examiners Board

2. Shared Documents
new document or drag files here

Name	Modified	Modified By
2014 Unsession Tracking	May 20	Camille Drinkwine
Budget Narrative Chart Spending by Fund Data	August 8	Alisha Cowell
FY 2012-14 Reconciliation	About an hour ago	Alisha Cowell
Plain Language Training Materials	July 24	Camille Drinkwine

3. Announcements
new announcement or edit this list

Title	Modified
BPAS Training Schedule	July 28

Calendar
October 2014

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
28	29	30 Budget Legislat	1 LAC Federa FNTS UATe	2	3 10:00 am BPAS Wc	4
5	6	7	8	9	10 10:00 am BPAS Wc	11
12	13 Columb 9:00 am F	14 1:00 pm Copy: FN	15 Base Data 9:00 am Copy	16 1:00 pm - 4	17 Copy: FNT	18
19	20	21 9:00 am 1:00 pm	22 9:00 am FNT 1:00 pm FNT	23 9:00 am - 3 FNTS User	24 Budget	25

1. All state agency libraries are listed down the left-hand side of the page
2. The Shared Documents library contains documents and information that all agencies need to access
3. The announcements and calendar features display important announcements and dates related to the budget cycle. 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 set of folders.

Budget Division Document Management

Minnesota Management and Budget

[+ new document](#) or drag files here

All Documents

Find a file

✓	Name	Document Status	MMB Status	Accessibility check?	Modified	Modified By
✓	Archive	...			May 16	<input checked="" type="checkbox"/> Camille Drinkwine
	Biennial Budget	...			May 16	<input checked="" type="checkbox"/> Camille Drinkwine
	LAC	...			May 16	<input checked="" type="checkbox"/> Camille Drinkwine
	Legislative Initiatives	...			May 16	<input checked="" type="checkbox"/> Camille Drinkwine
	Spend Plan	...			May 16	<input checked="" type="checkbox"/> Camille Drinkwine

Uploading a Document to the SharePoint Site

1. Select the folder that you wish to upload your document to

Budget Division Document Management

Minnesota Management and Budget

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

[+ new document](#)

All Documents

Find a file

✓	Name	Document Status	MMB Status	Accessibility check?	Modified	Modified By
	Archive	...			May 16, 2014	<input type="checkbox"/> Camille Drinkwine
	Biennial Budget	...			May 16, 2014	<input type="checkbox"/> Camille Drinkwine
	LAC	...			May 16, 2014	<input type="checkbox"/> Camille Drinkwine
✓	Legislative Initiatives	...			May 16, 2014	<input type="checkbox"/> Camille Drinkwine
	Spend Plan	...			May 16, 2014	<input type="checkbox"/> Camille Drinkwine

2. Select New Document

Budget Division Document Management

2016 Session › Preliminary Proposals

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

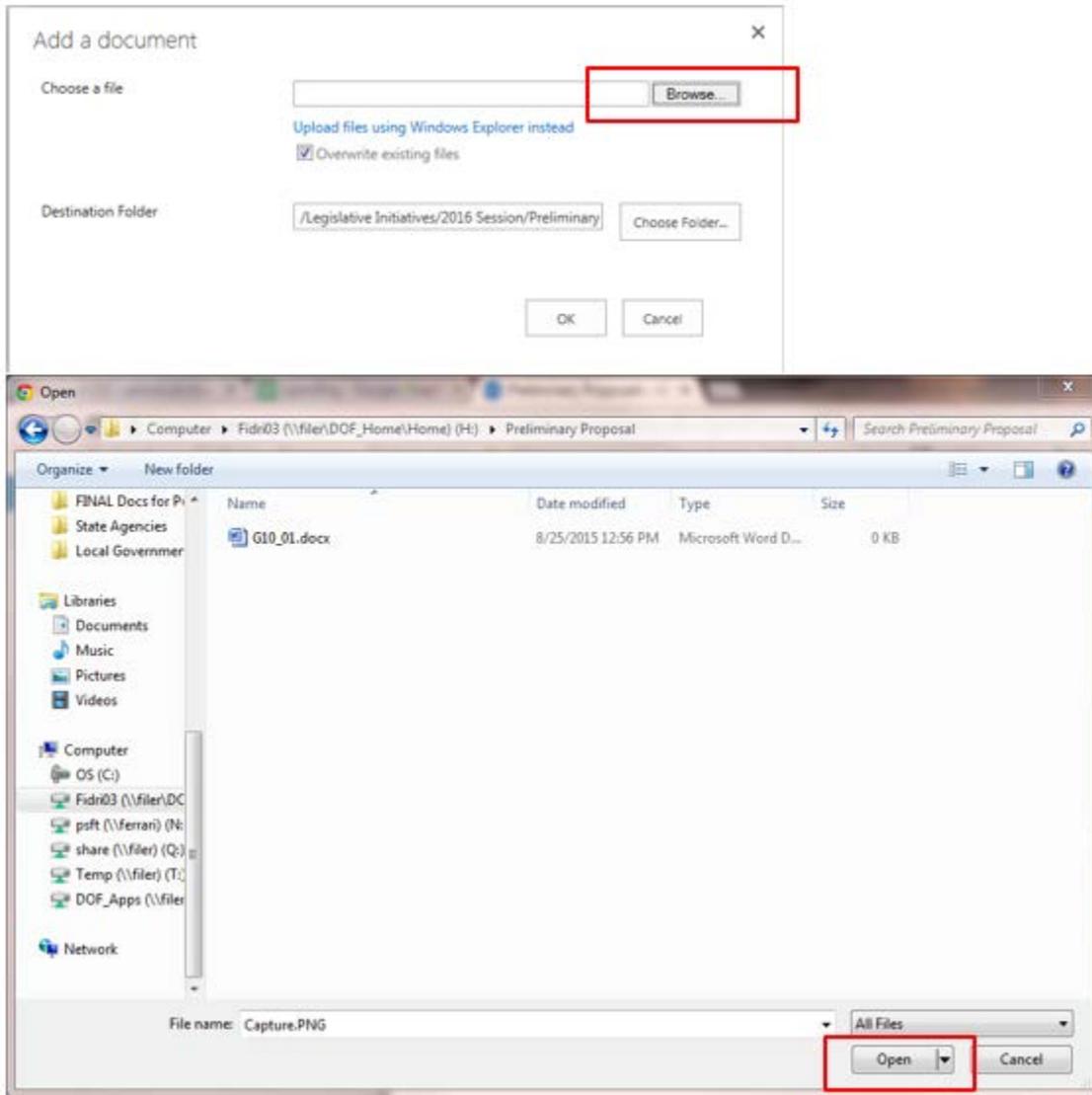
 new document

All Documents ... Find a file 

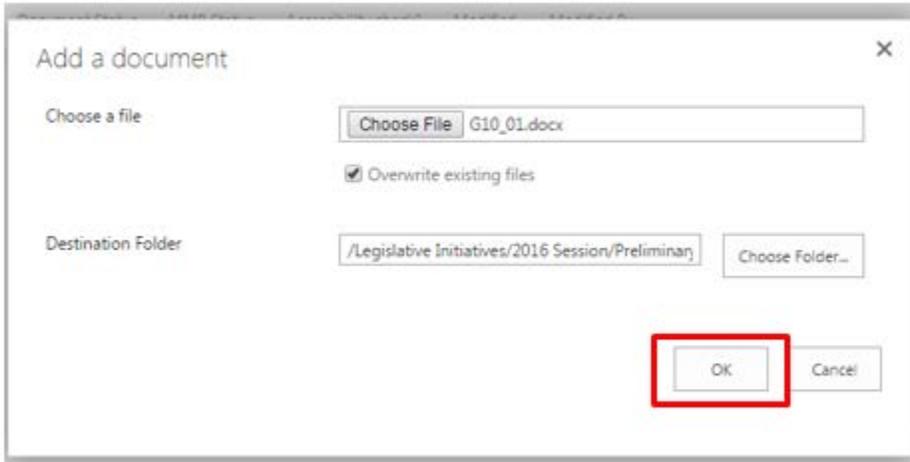
✓  Name Document Status MMB Status Accessibility check? Modified Modified By

There are no files in the view "All Documents".

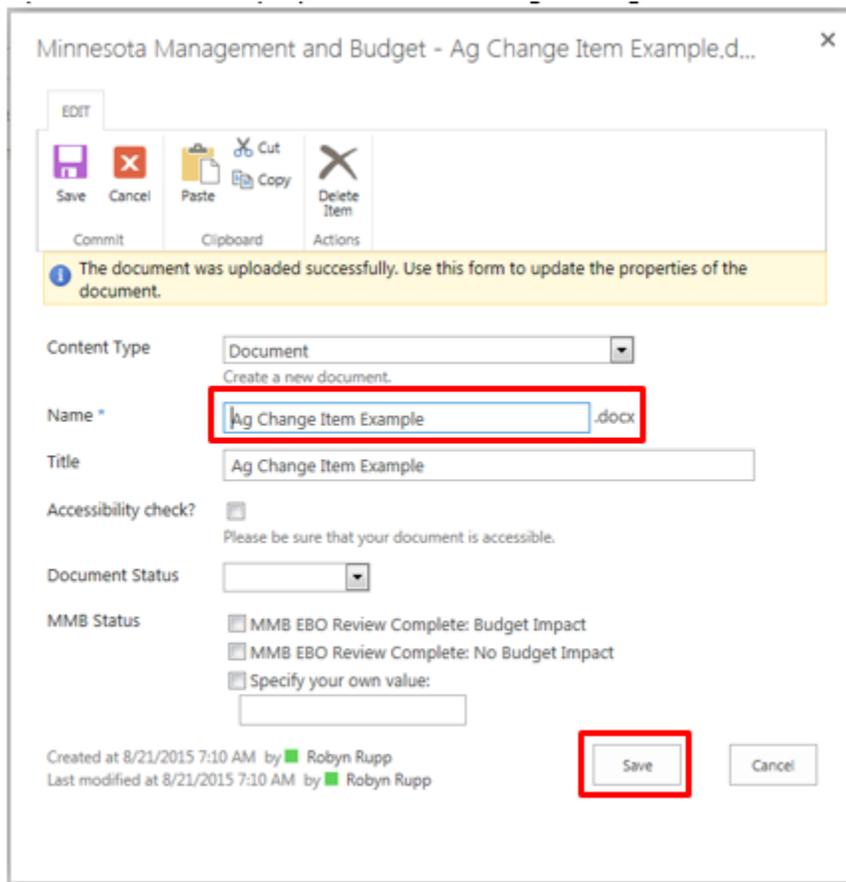
3. Select "Browse" to find the document (s) you wish to upload, and select open when you have highlighted the correct document



4. Click 'OK' button.



The uploaded document properties can be changed using the form shown below.

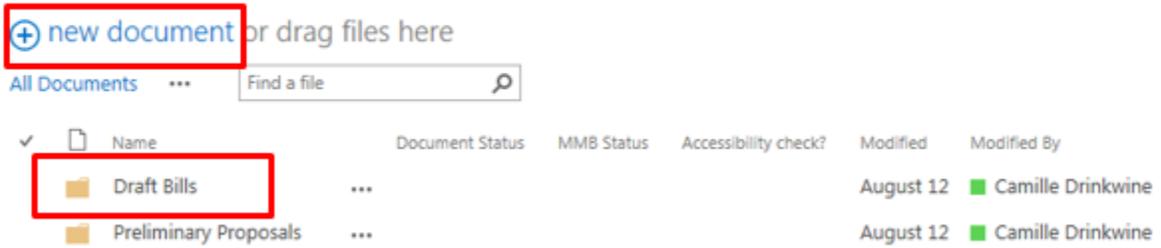


5. Select Save

Uploading Multiple Documents to the SharePoint Site

1. Navigate to the folder that you wish to upload your document to.
2. Drag your documents from your desktop over to the New Document button

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



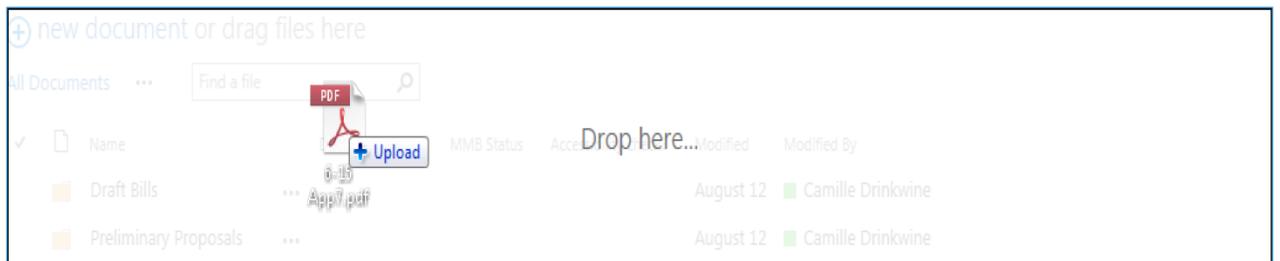
3. The text will change to display a box that says “drop here...”

Budget Division Document Management

Search this site

Legislative Initiatives › 2016 Session

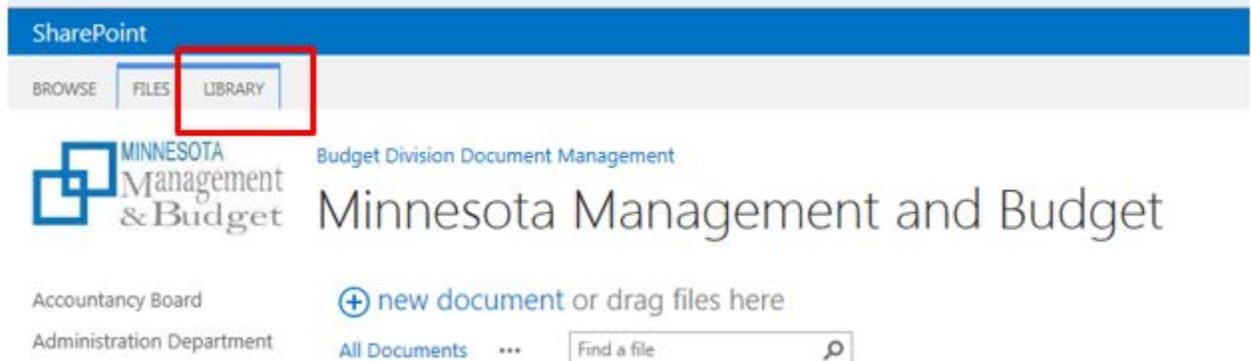
Please note that all draft budget documents are considered private, non-public data as authorized by Minn. Stat. §13.605.



4. Drop your document(s) in this box to upload them to the site.

OR

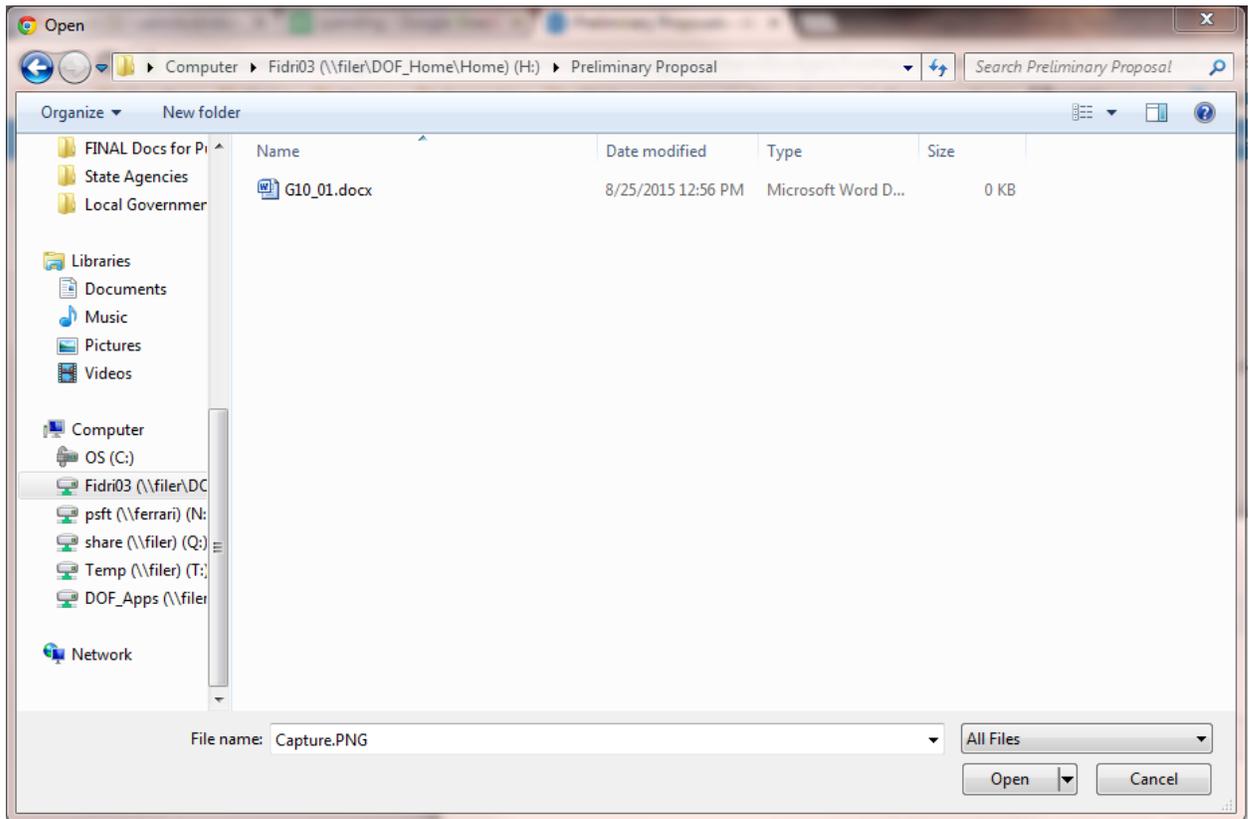
1. Navigate to the folder where you wish to upload the files
2. Select the Library tab in the left-hand corner of the page



3. Select the "Open with Explorer" button to open the sharepoint files in Windows Explorer



4. An explorer window will appear. Either drag and drop or copy and paste the document(s) you wish to upload to this location on the sharepoint site.



5. Close out of the window when you have finished moving your document(s) and refresh the SharePoint page. Your document should now be on the SharePoint site.

https://connect.mn.gov/sites/BPAS/MinnesotaManagementandBudget/Forms/AllItems.aspx - Preliminary Proposals - All ...

SharePoint Newsfeed OneDrive Sites Camille Drinkwine

BROWSE FOLLOW SYNC

MINNESOTA Management & Budget Budget Division Document Management

2016 Session - Preliminary Proposals

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

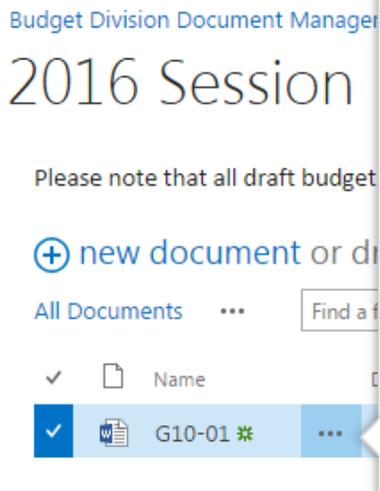
+ new document or drag files here

All Documents Find a file

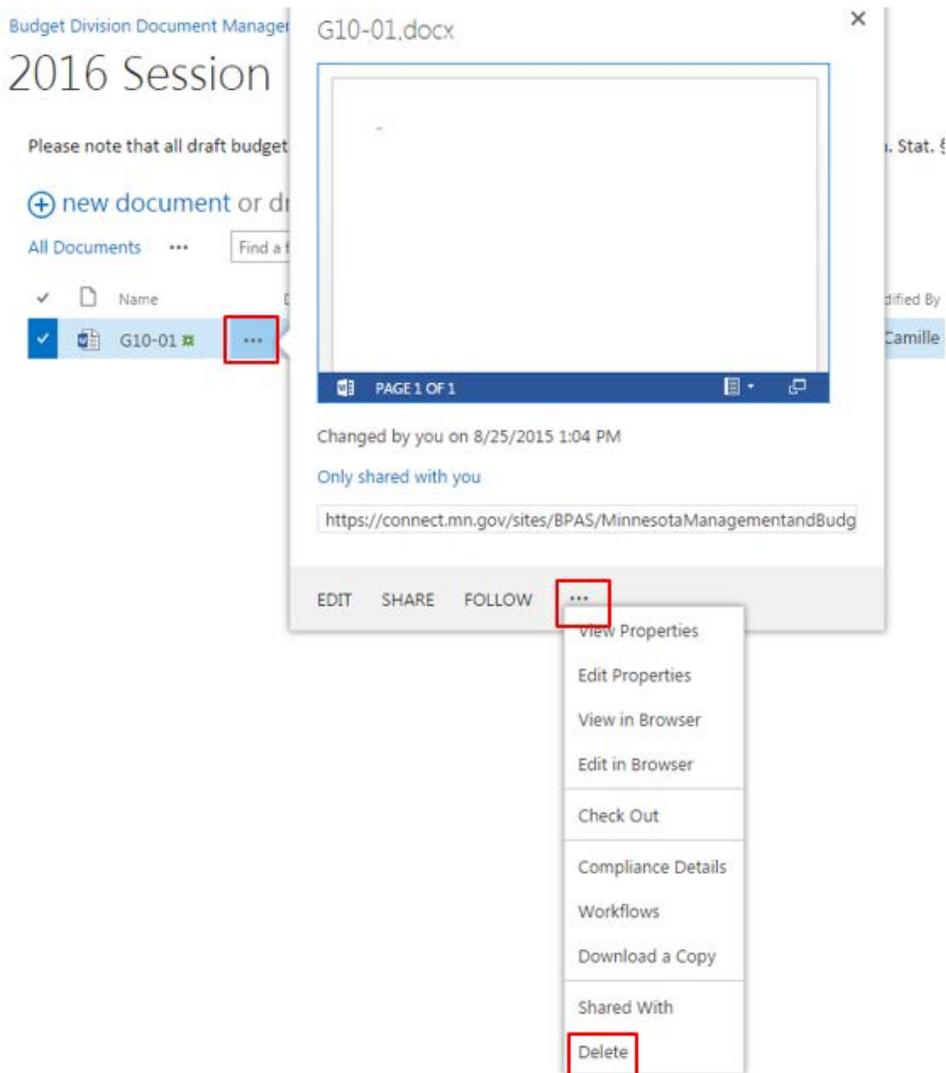
Name	Document Status	MMB Status	Accessibility check?	Modified	Modified By
This is a placeholder document			No	3 minutes ago	Camille Drinkwine

Deleting a Document

1. Select the checkmark next to the document

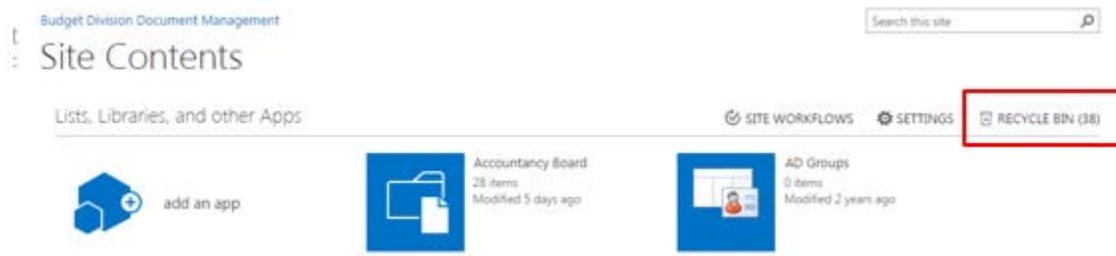


2. Select the ellipsis to the right of the document name
3. Select the ellipsis to the right of the "Follow" button and select "Delete"



Recovering a Deleted Document

1. Select "Site Contents" on the left hand menu
2. Select the "Recycling Bin" icon at top right of the page



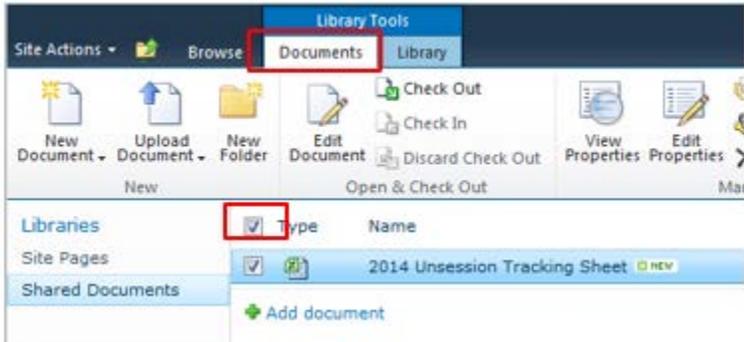
3. Click the check box next to the document you wish to restore and select "Restore Selection"



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 the “Check Out” icon in the Library Tools menu.



2. SharePoint may tell you that you are about to check out this document. If it does, select “Ok.”

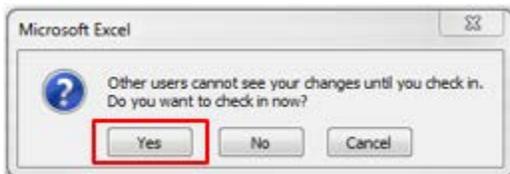


3. To ensure that the document has been checked out to you for editing, there should now be a small green arrow on top of the document icon.



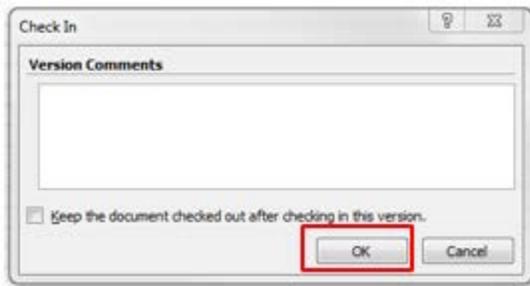
4. Click on the document you just “Checked Out” and open it to make all of your changes. CLICK SAVE when you are finished.

5. Exit out of the document. This will prompt you with a message to check in your document. Select “Yes.”

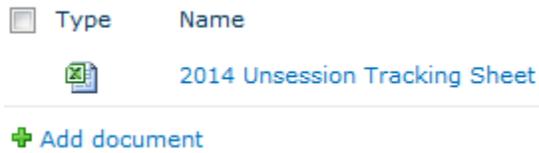


Note: You must check in the document before anyone else can make changes to the file.

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.



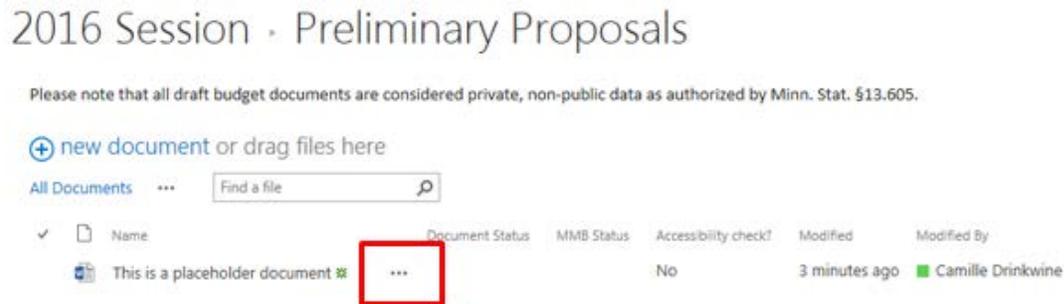
7. The SharePoint page should refresh automatically within a matter of seconds. If not, click F5 to refresh the page. The “Checked Out” arrow should no longer be on the page.



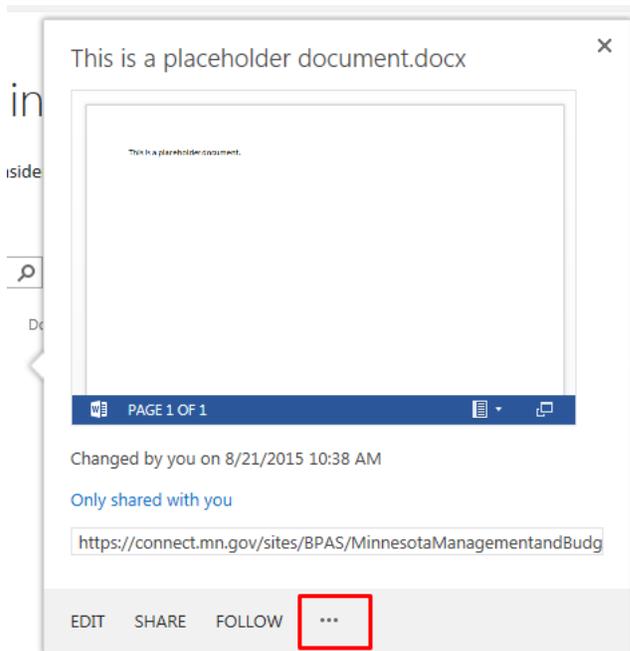
8. (Optional) Click on name of the file to view and make sure all changes were saved.

Editing Document Properties

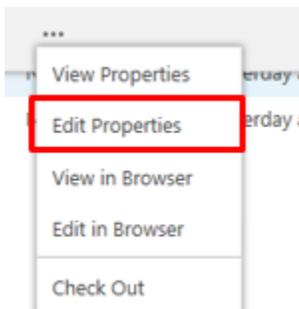
1. To change the name or status of a document, simply select the three dots on the right-hand side of the document name



2. Select the dots once again



3. Select edit properties to take you to the properties menu



4. Make the appropriate changes and click save.

Content Type ▼
 Create a new document.

Name * .docx

Title

Accessibility check?
 Please be sure that your document is accessible.

Document Status ▼

MMB Status ▼
 MMB Review 1
 Pulled
 MMB Review Complete: Budget Impact
 MMB Review Complete: No Budget Impact
 Specify your document status

Created at 10/24/2014 1:46 PM by ■ Pollard, John
 Last modified at 10/24/2014 1:46 PM by ■ Pollard, John

OR

1. Select the check mark next to your document

2016 Session ▸ Preliminary Proposals

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[+ new document](#) or drag files here

All Documents ... 🔍

✓	Name	Document Status	MMB Status	Accessibility check?	Modified	Modified By
<input checked="" type="checkbox"/>	This is a placeholder document #	...		No	3 minutes ago	■ Camille Drinkwine

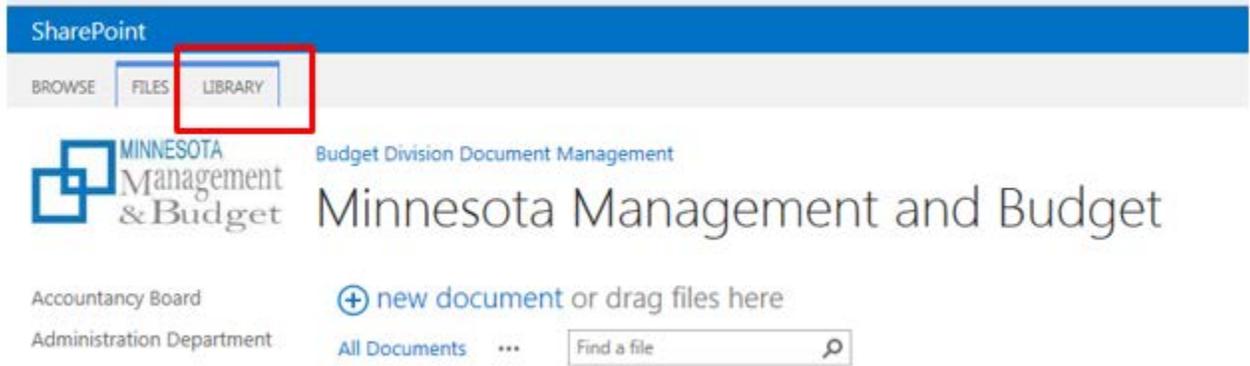
2. Select "Edit Properties" from the library tab



3. Make the appropriate changes and click save.

Printing Document(s)

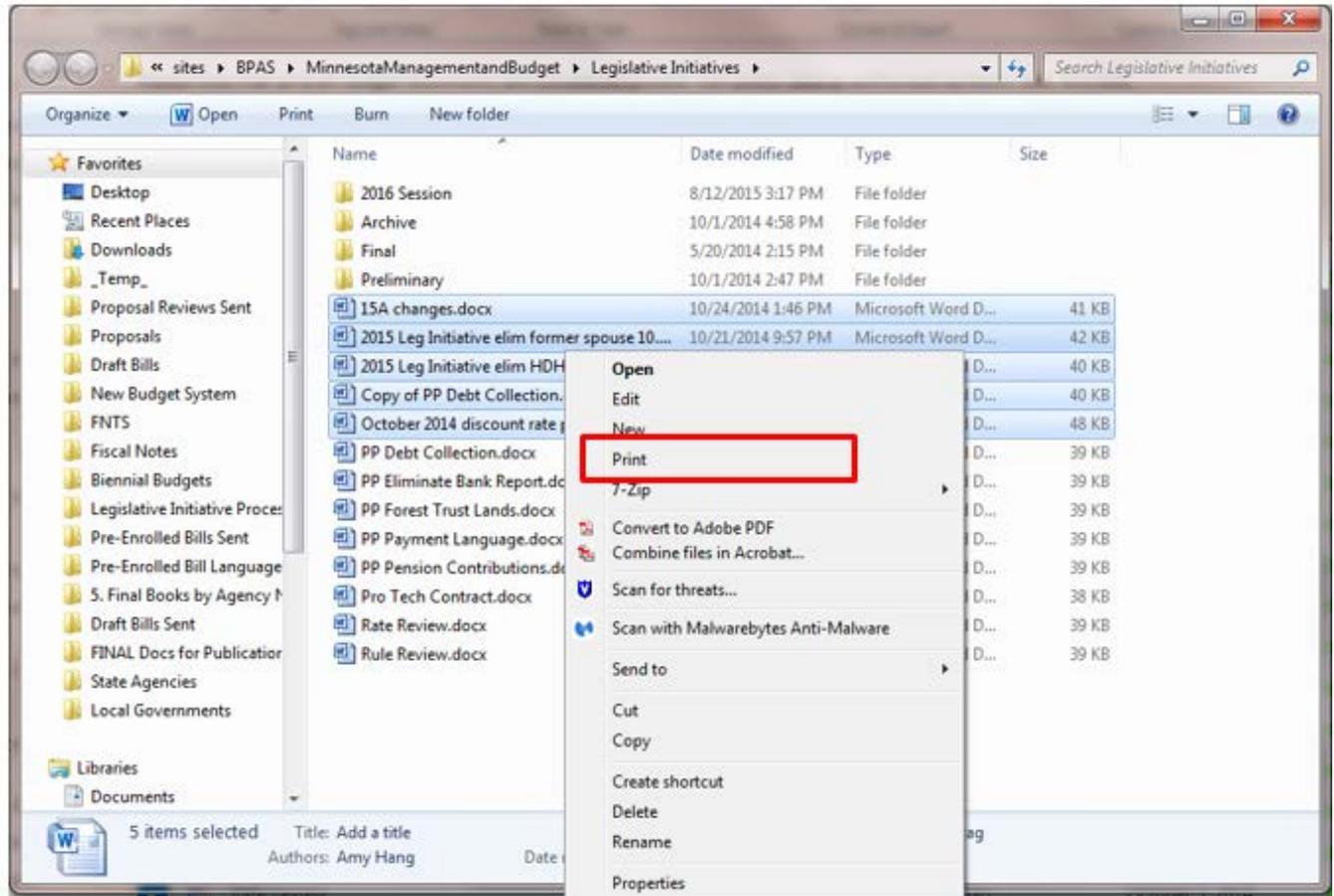
1. Navigate to the folder where your documents are located
2. Select the Library tab in the left-hand corner of the page



3. Select the "Open with Explorer" button to open the sharepoint files in Windows Explorer



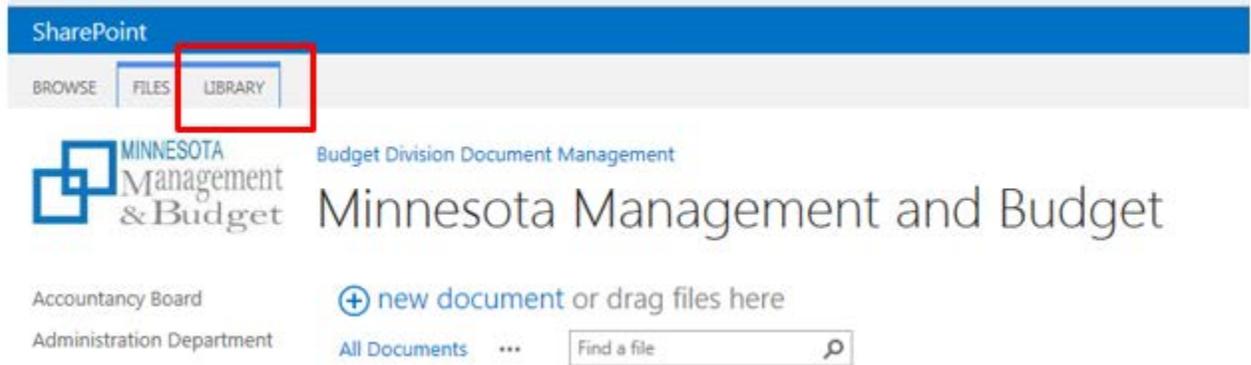
4. Select the documents you wish to print, right click, and select "Print"



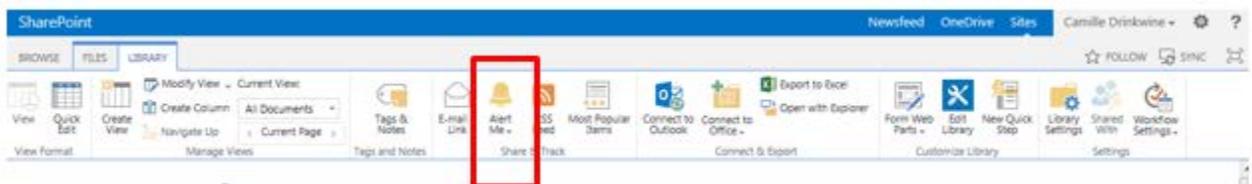
Email Notifications

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

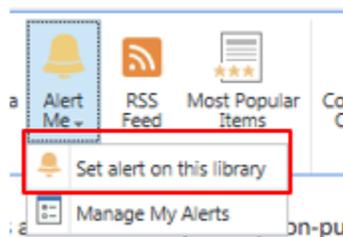
1. Select the agency you wish to receive notifications for
2. Select the Library tab in the left-hand corner of the page



3. Select the "Alert Me" icon



4. Select "Set an alert on this library"



5. Set your alert preferences on the New Alert menu and click OK to save this alert.

Minnesota Management and Budget - New Alert

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

Minnesota Management and Budget

Delivery Method
Specify how you want the alerts delivered.

Send me alerts by:

E-mail Camille.Drinkwine@state.mn.us

Text Message (SMS)

Send URL in text message (SMS)

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

Only send me alerts when:

All changes

New items are added

Existing items are modified

Items are deleted

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.

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

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

Send notification immediately

Send a daily summary

Send a weekly summary

Time: Thursday 9:00 AM

OK Cancel