



SharePoint User Guide

MMB Budget Division Document Management SharePoint site

Revised June 2024

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Budget Division SharePoint - Access, Login and Assistance

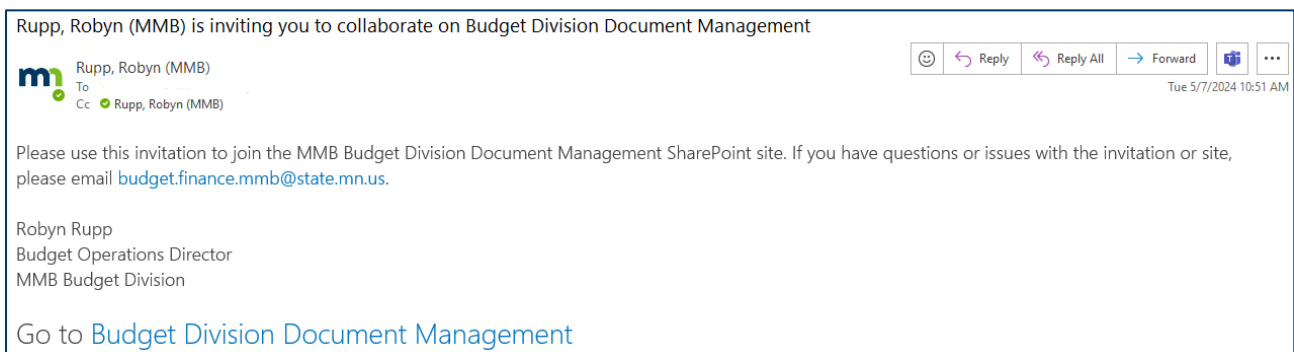
Agency budget coordinators or directors request access to the Budget Division Document Management SharePoint site for agency staff by completing the [Budget Systems User Authorization Form](#) and emailing it to the MMB Budget Planning and Operations team at budget.finance.mmb@state.mn.us.

New User Access to the Budget Division SharePoint site

If you are a new SharePoint user and access has been requested to the site through the authorization form, the [Budget Division Document Management SharePoint site](#) will be shared with you by the MMB Budget Planning and Operations team.

You should receive an email (see example below) with a link to the site with the following settings:

- The message will be sent from no-reply@sharepointonline.com.
- The subject line will contain the name of the person from the MMB Budget Planning and Operations team who initiated the sharing request to give you access.
- The personal invitation text will appear after the greeting.



Non-Office 365 Users – New User Access

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

After clicking the site link from the email, you will be asked to sign in with your Office 365 email address. If your organization is currently using Office365, this will typically be your username (e.g., First and Last name) and your organization's email address or domain. If your organization is not on Office365, this will be your recently created work or personal Microsoft email address (e.g., @outlook.com, @hotmail.com, @msn.com).

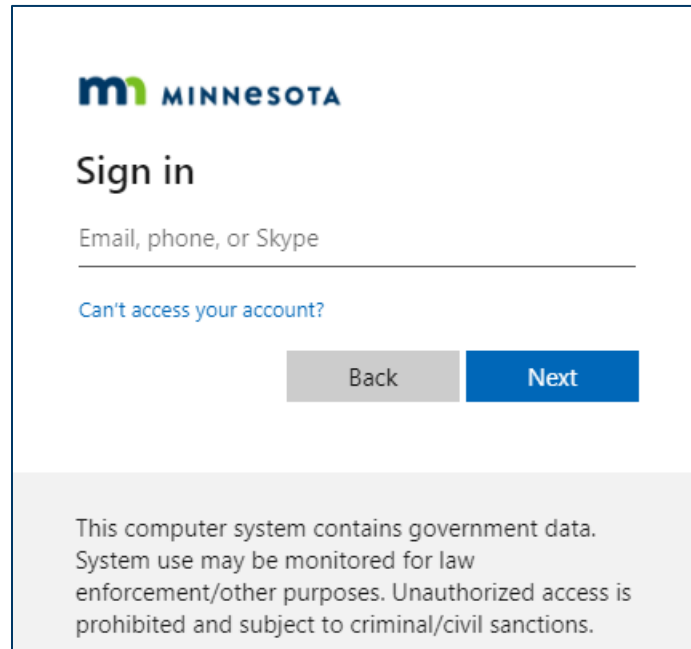
Sign in with your associated email address to log into Office365 and access the Budget Division Document Management SharePoint site. You should not need to enter a password unless you are accessing the SharePoint site from outside of the State of Minnesota network.

Logging into the SharePoint site

If your organization is on the Microsoft Cloud (Office 365), you currently have an organizational account. The link you receive in the invitation email should be sufficient to log into the Budget Division SharePoint site.

The Budget Division Document Management SharePoint site is available at <https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>.

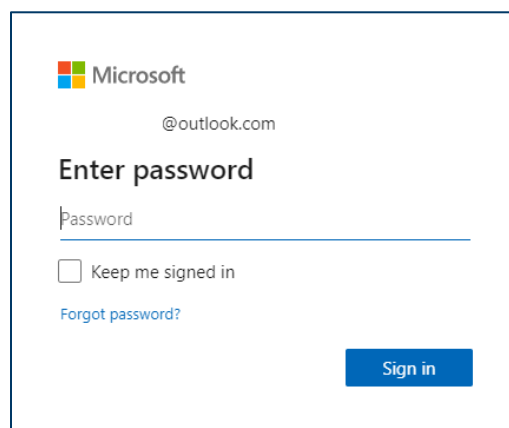
After clicking on the link, it will require you to login using the screen shown below.



The screenshot shows a login page for the State of Minnesota. At the top left is the 'm MINNESOTA' logo. Below it is the heading 'Sign in'. There is a text input field labeled 'Email, phone, or Skype'. Below the input field is a blue link that says 'Can't access your account?'. At the bottom of the input area are two buttons: a grey 'Back' button and a blue 'Next' button. At the bottom of the page, there is a grey box containing the following text: 'This computer system contains government data. System use may be monitored for law enforcement/other purposes. Unauthorized access is prohibited and subject to criminal/civil sanctions.'

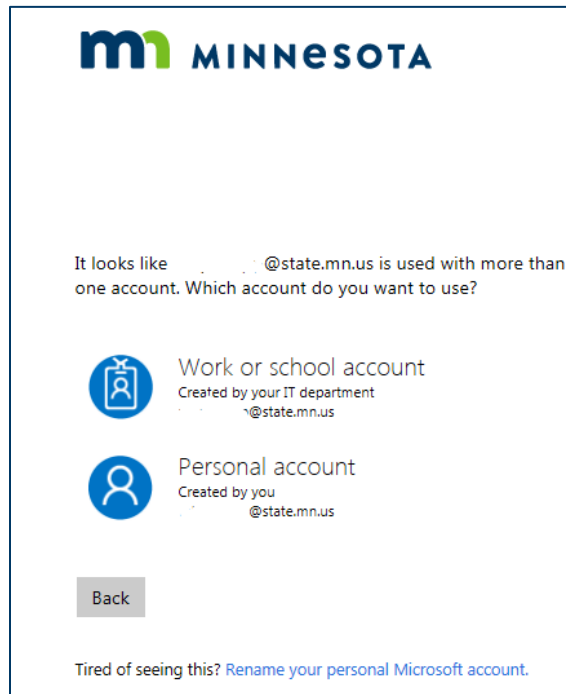
To login, use your State of Minnesota email address and click the Next button. The SharePoint site should recognize your email from Outlook and will automatically log you into Microsoft Office 365.

You should only need to enter a password if you are outside of the state.mn.us network. If prompted for a password, enter your password and click the Sign in button.



The screenshot shows a Microsoft login page. At the top left is the Microsoft logo. Below it is the text '@outlook.com'. The heading is 'Enter password'. There is a text input field labeled 'Password'. Below the input field is a checkbox labeled 'Keep me signed in' and a blue link that says 'Forgot password?'. At the bottom right is a blue 'Sign in' button.

If you have a work (or school) account and a personal account, you may need to choose which one to use to access the Budget Division SharePoint site.



Questions and Assistance

Email the MMB Budget Planning and Operations team at budget.finance.mmb@state.mn.us if you have access issues or questions related to our SharePoint site features or functions. We may work with MNIT Services if additional technical expertise or Active Directory support is needed.

Budget Division SharePoint Site

The Budget Division Document Management SharePoint site includes [Document Libraries](#) (folders) for each agency for the purposes of collecting and reviewing budget narratives, legislative advisory commission requests, legislative initiatives, annual spending plan certification form and reports, and other related budget process documents as needed.

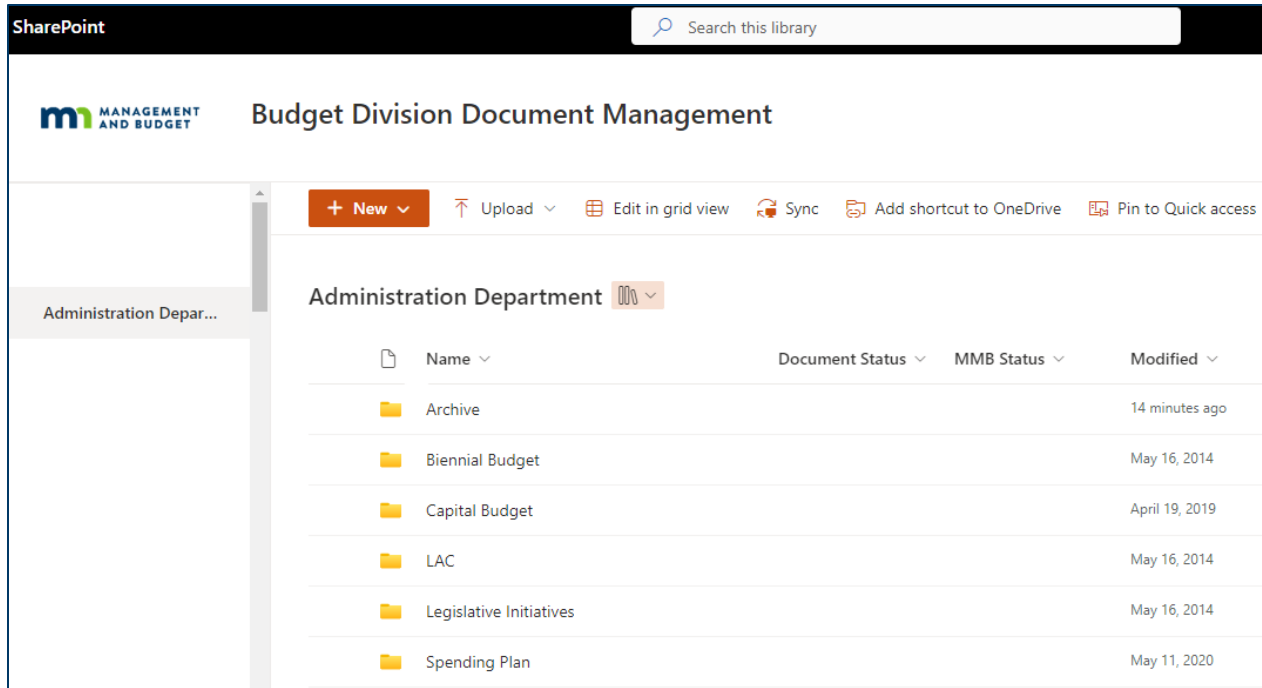
1. All State of Minnesota agency libraries (folders) are listed on the left-hand side menu of the SharePoint site; however, you will only see the agency or agencies folders that you have verified user access to. If you are not seeing the correct agency folder(s) that should appear in your view, contact us.
2. The rest of the homepage for the Budget Division Document Management SharePoint site displays announcements, news and dates related to budget related processes. This is updated by the MMB Budget Planning and Operations team to help communicate important information throughout budget processes. The Shared Templates library may contain documents and information that all agencies can access and use.

The screenshot shows the SharePoint site for Budget Division Document Management. The page features a left-hand navigation menu with a list of agency folders, including the Accountancy Board, Administration Department, and various boards and commissions. The main content area is titled "Budget Division Document Management" and includes a search bar, a welcome message, and sections for "General Announcements" (currently empty) and "Shared Templates" (with options to create new items or upload files). A "Budget Division Calendar" for August 2021 is also displayed, showing a grid of dates from Sunday to Saturday.

Your Agency's Document Library (Folder) in SharePoint

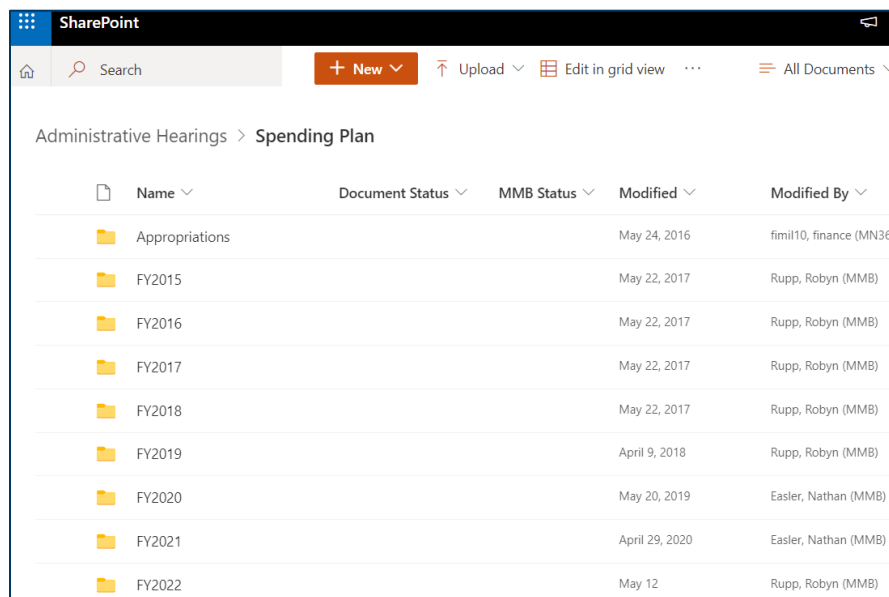
An agency document library includes folders that help organize documents for the budget processes. Each agency library typically has the same subfolders which may include: Biennial Budget, Capital Budget, LAC, Legislative Initiatives and Spending Plan.

Click on your agency folder in the left-hand side menu to enter its document library.

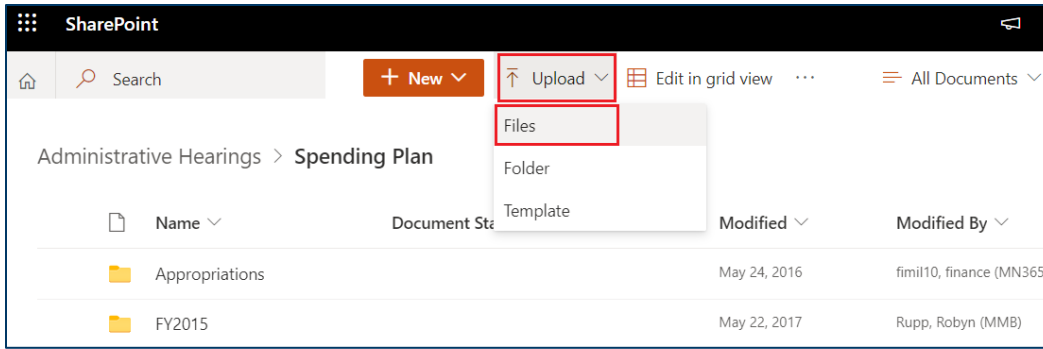


Uploading a Document to Your Agency Folder

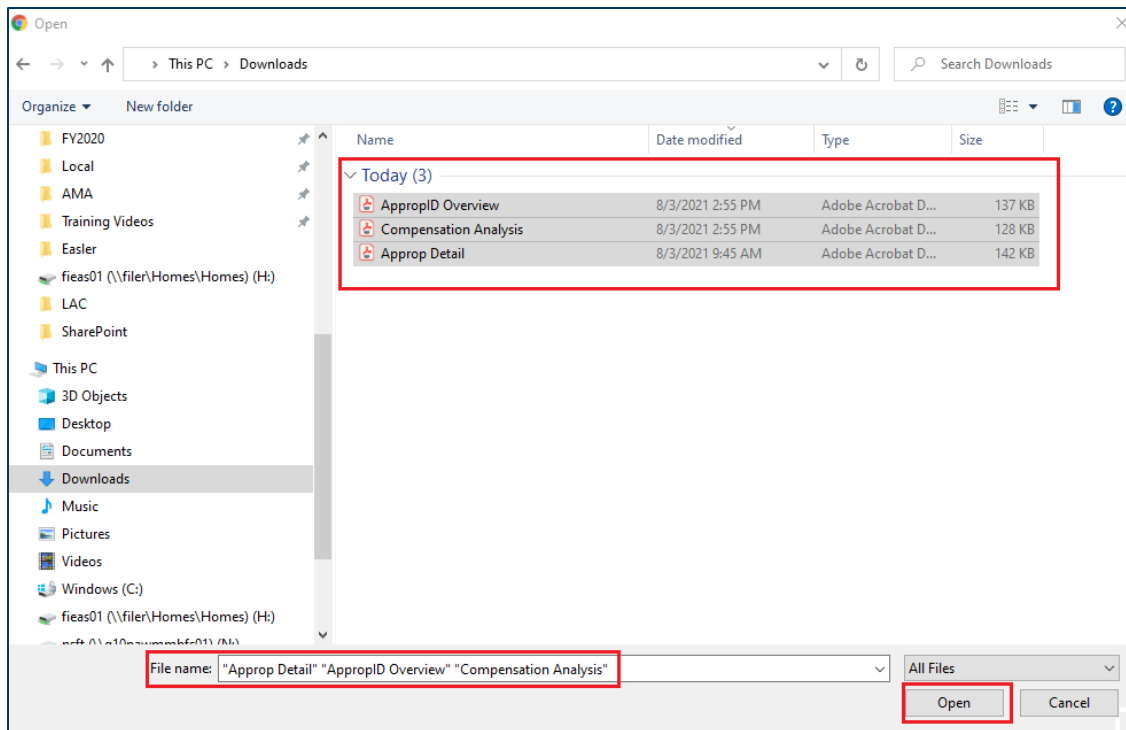
1. Click and open the folder where you would like to upload your document(s) or file(s) into.
2. In the example below, the Spending Plan folder is open within the “Administrative Hearings” top-level folder.



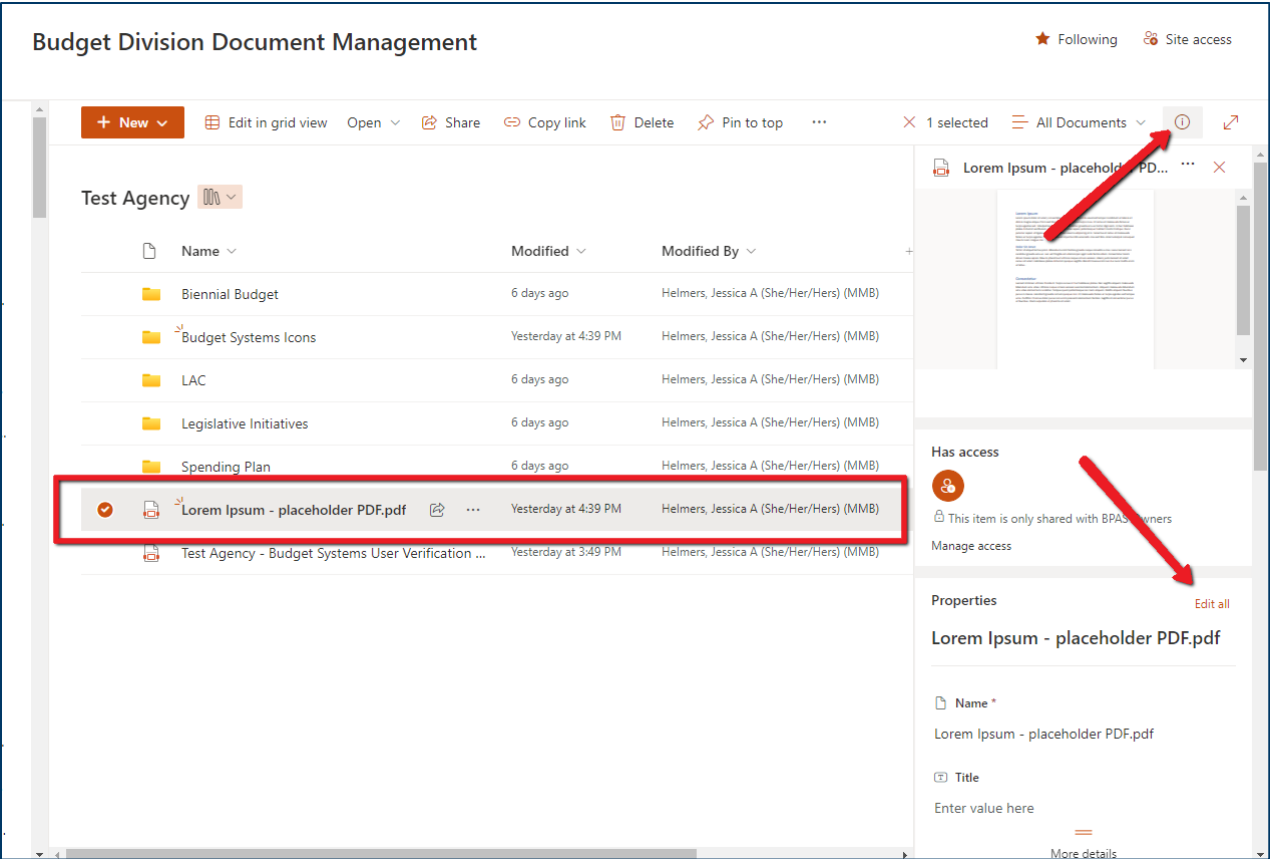
3. Select Upload once you are in the appropriate folder. A dropdown menu appears with the option to upload files, a folder, or a template.
4. Choose Files to search and upload files using your device’s File Explorer.



5. A File Explorer window opens to allow users to choose a file or files to upload.
 - a. Select the file(s) you wish to upload, then select Open and the file(s) selected will upload to the current SharePoint folder.
 - b. To upload multiple files, hold down the Ctrl key and select each file.



6. The uploaded files' properties can be changed by selecting the files within SharePoint and clicking on the Edit All link on the right-hand Properties menu.
 - a. Note: The Details Pane can be opened by clicking the Information icon (circle containing the letter "i") in the upper right-hand corner of the screen.



7. Change the file or document properties, as needed, then select Save.

Save Cancel Copy link

Change Item--IT Addendum to HR Workflow System.docx

Content Type
Document

Name
Change Item--IT Addendum to HR Workflow System

Title
IT Project Budget Proposal

Document ID
https://mn365.sharepoint.com/sites/MMB-Budget/_layouts/15/DocIdRedir.aspx?
BPAS-20-107

Permanent link to this document.

Document Status
Agency Preparation

MMB Status
—

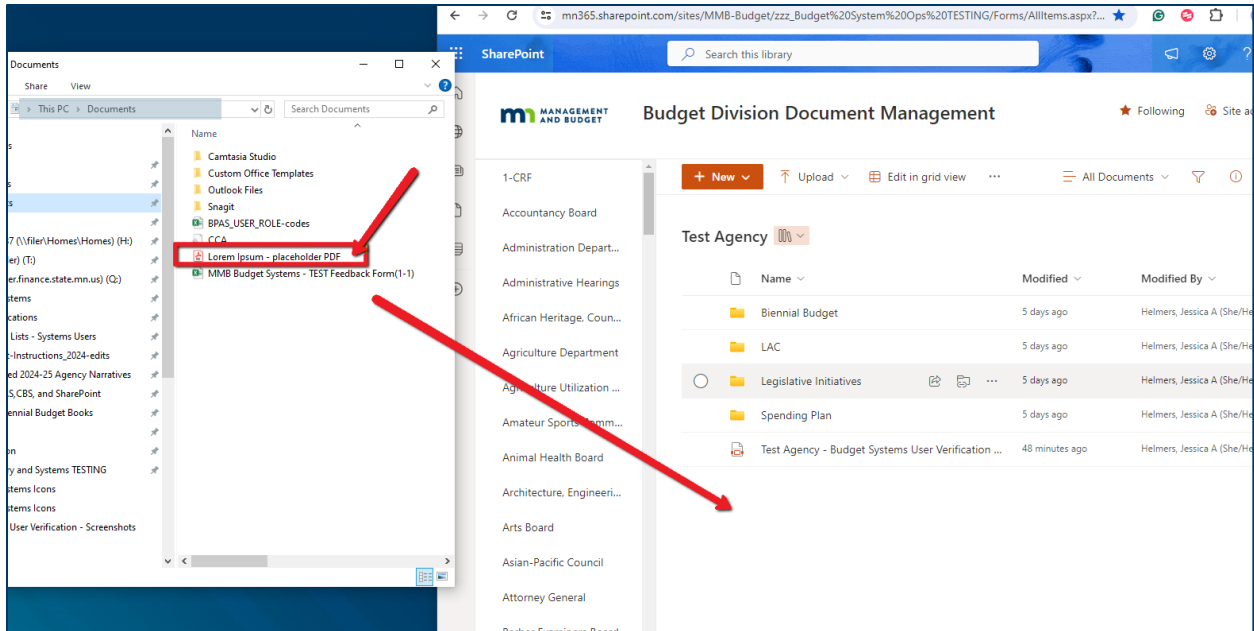
Sensitivity
None

Save Cancel

Drag-and-Drop Method

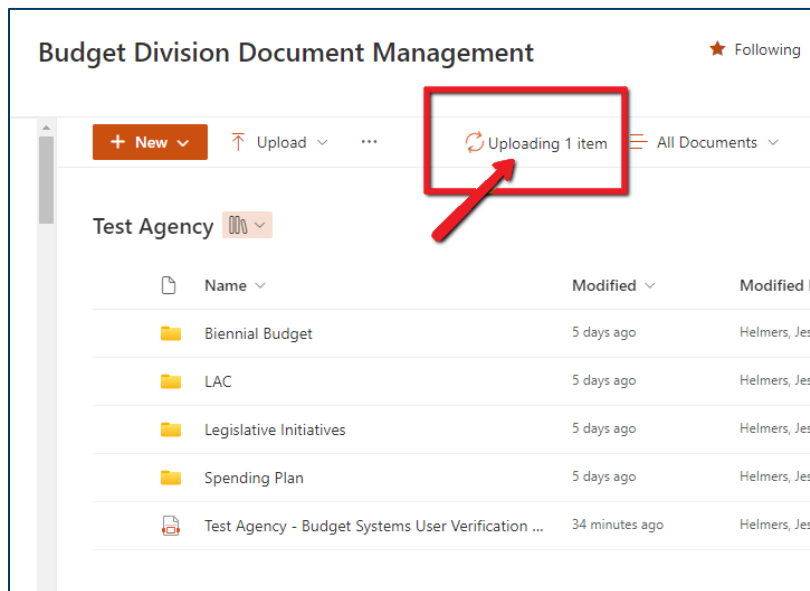
You can also “drag and drop” files from a folder on your device or shared drives.

1. Open the file explorer window where the file(s) or folder(s) are located.
2. Select a file(s) or folder(s) that need to be uploaded to your team’s agency folder.
3. Click and hold the file selection and drag them over to the SharePoint browser window.

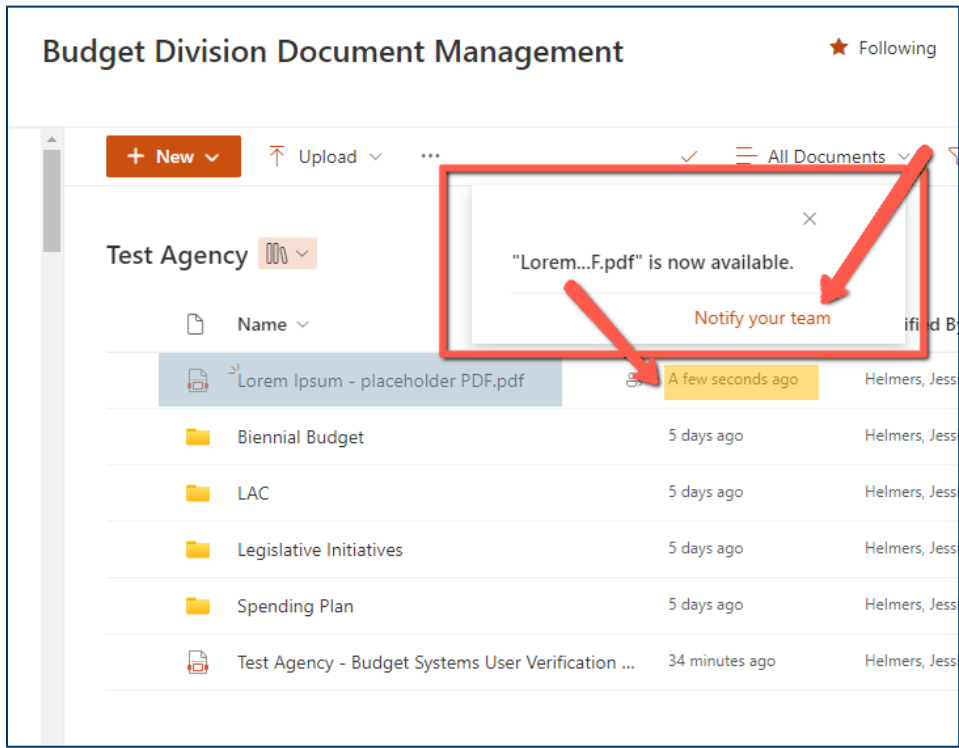
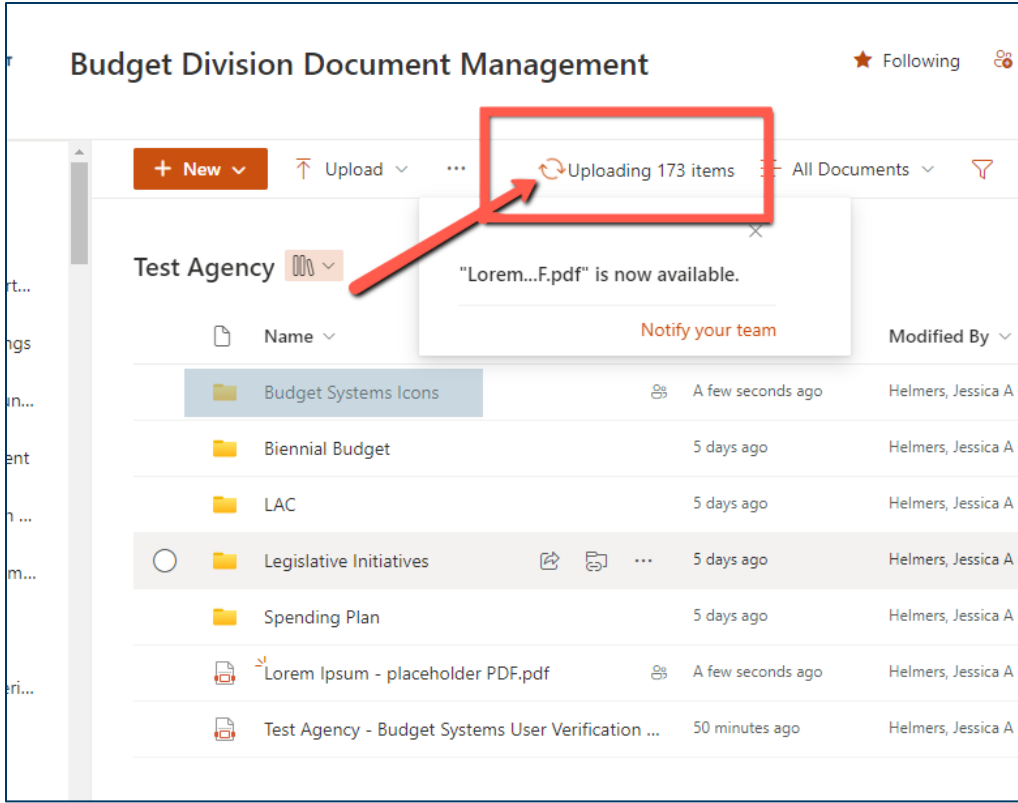


SharePoint notifies users with the status of Document Library uploads. This includes when documents are being uploaded and when uploads are successful.

Note: The “Uploading” notification may disappear quickly if the file(s) are smaller in quantity and/or size.



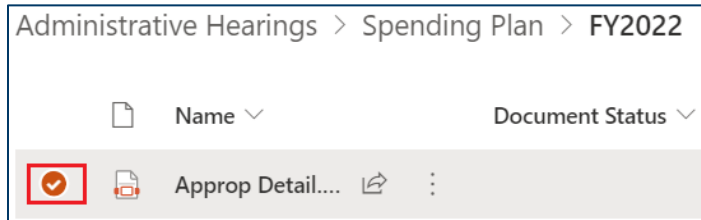
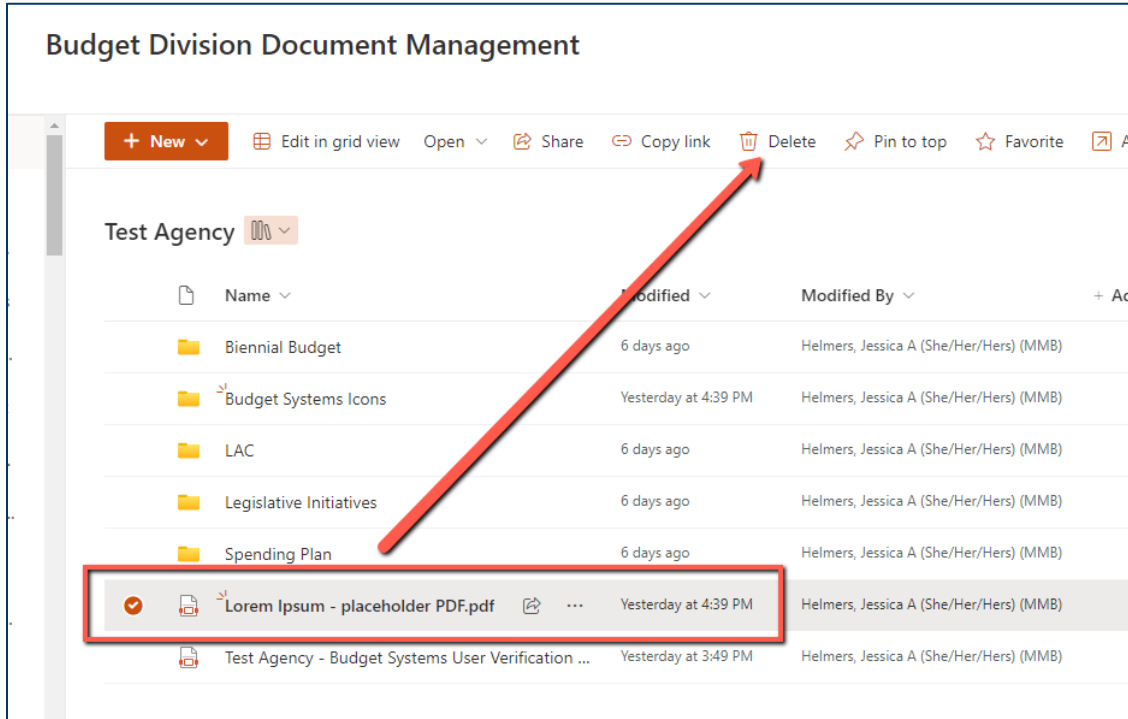
If this occurs, you should still be able to confirm your file(s) were successfully added and see an update in the Modified column of the folder.



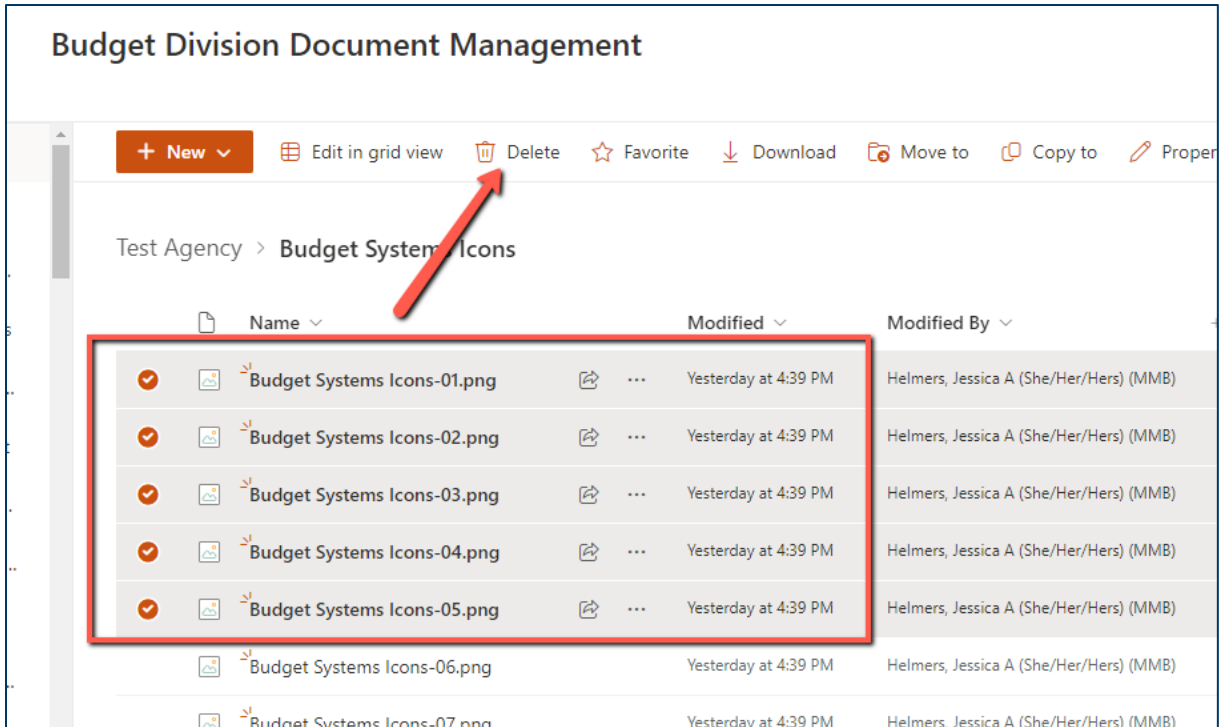
Deleting a Document from Your Agency Folder

There are two ways to delete or remove a document or file(s) from your agency's folders in the SharePoint site:

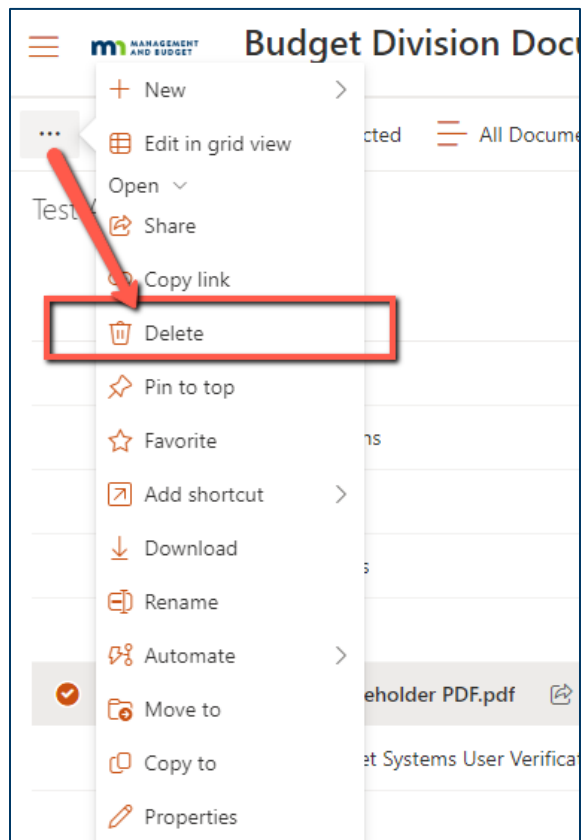
1. Use the Delete button at the top of the navigation pane.
2. Select the checkmark next to the document:



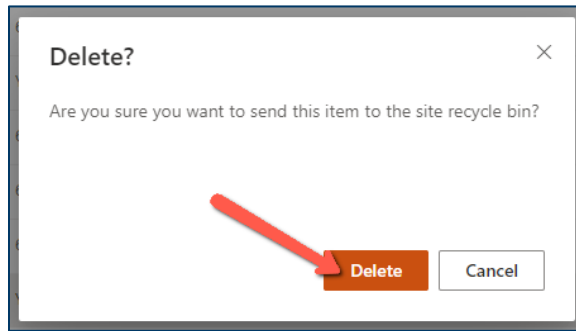
- a. If deleting multiple documents, select the checkmark next to each file you would like to delete.



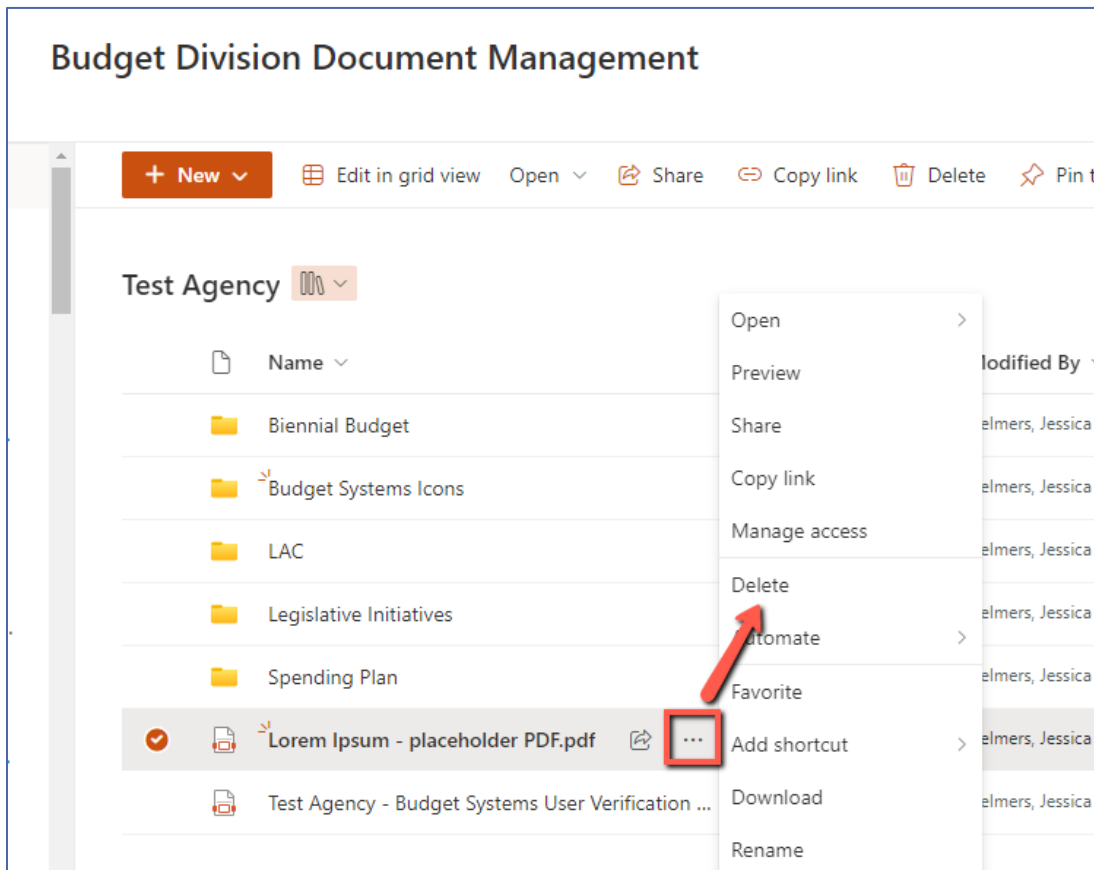
- b. Select the Delete (trash bin) option in the tools pane.
- c. On smaller screens, select the ellipsis (three dots) from the top menu and select Delete from the dropdown menu.



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

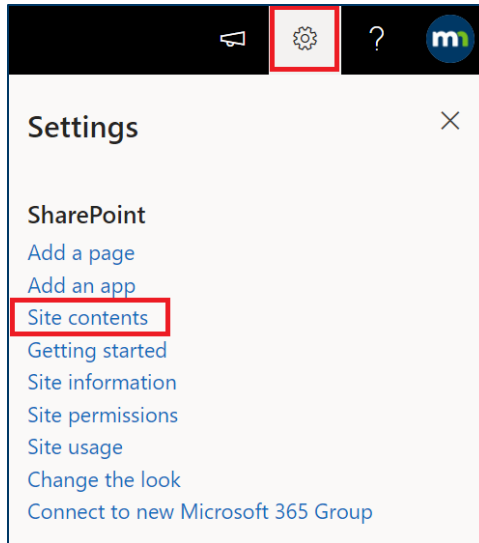


2. Select the checkmark next to the document and select the ellipsis (three dots) to the right of the document name. Then select the **Delete** option.

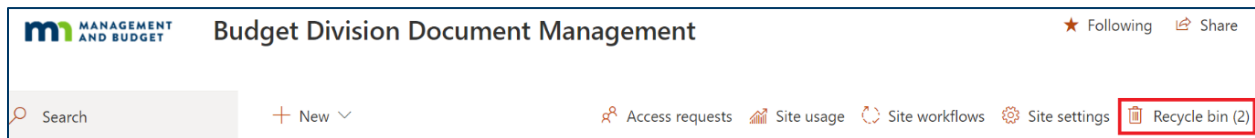


Recovering a Deleted Document

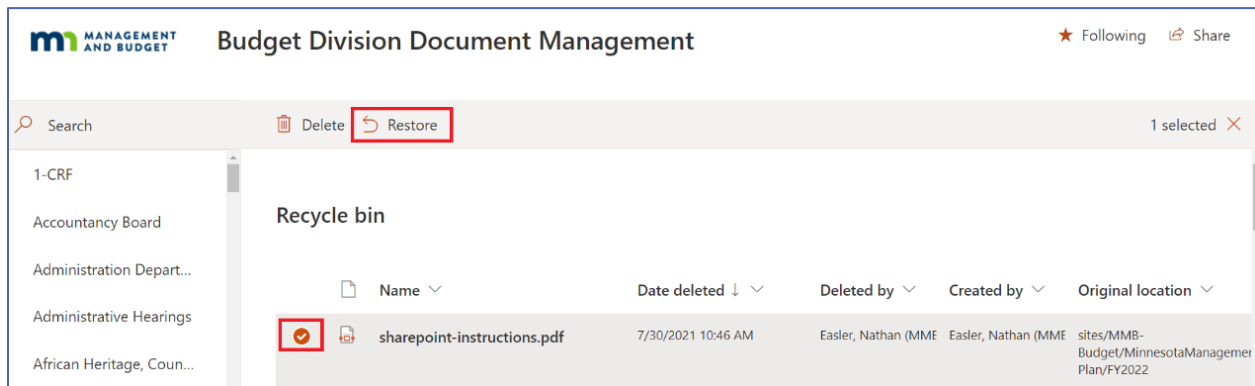
1. Click on the Settings cog icon in the upper right-hand corner of the screen and select **Site Contents** from the dropdown menu.



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



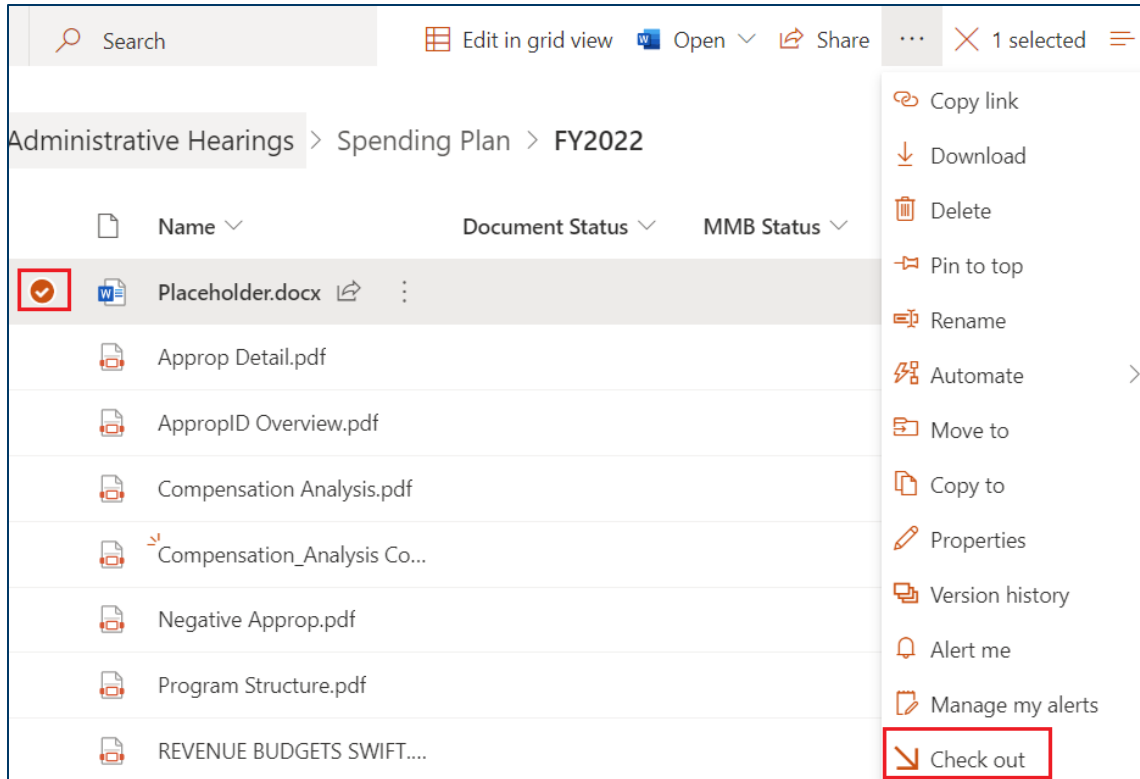
3. Click the checkbox next to the document you wish to recover and select Restore.



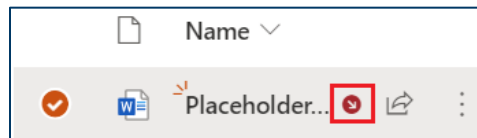
Editing a Document in Your Agency Folder

The best way to ensure that changes to a document are saved properly is to Check Out the document to be edited and Check In the document once your edits are completed.

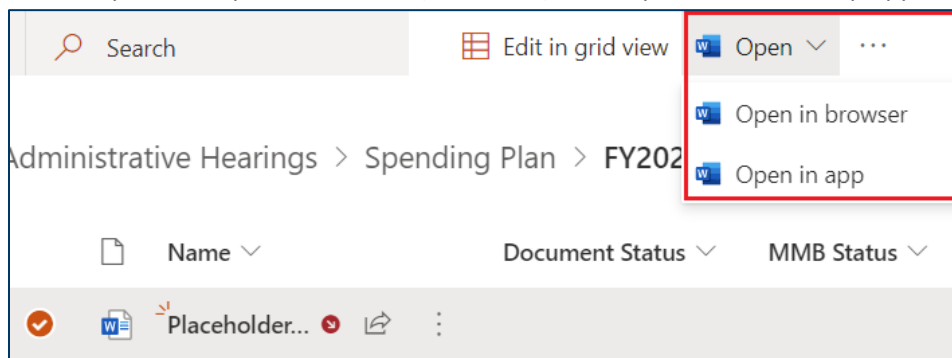
1. Select the checkbox next to the document you wish to edit and click on ellipsis (three dots) at the top right-hand corner. Then, select Check out from the dropdown menu.



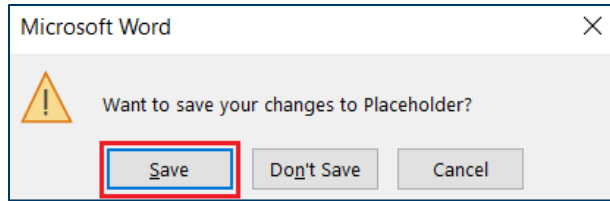
- SharePoint will indicate in the top right-hand corner that the document is being checked out. To ensure that the document has been checked out to you for editing, there will be a small red arrow at the bottom of the document icon.



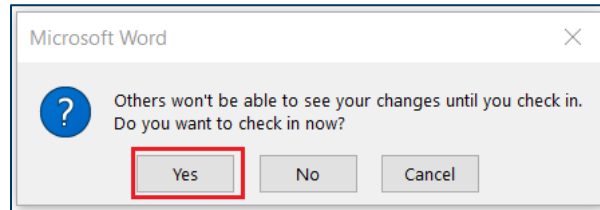
- Click on the document you just checked out and select Open it to make your changes.
- Users have the option to Open in browser (Office365) or to Open in the desktop app.



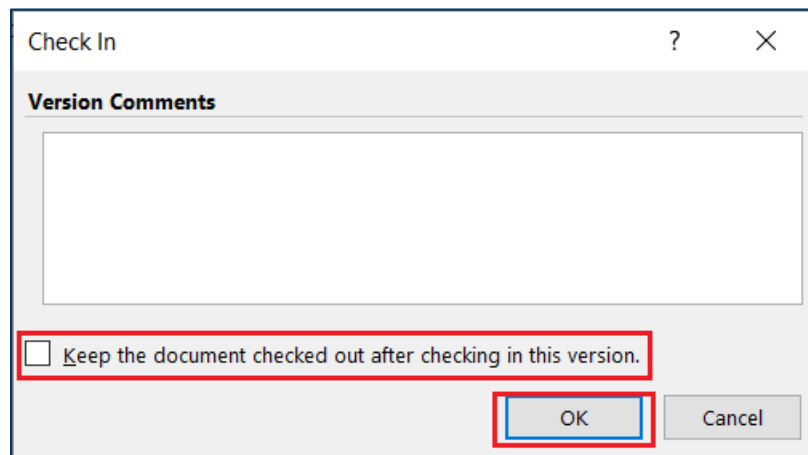
- If the Open in browser option is chosen, changes are saved dynamically to SharePoint in the Microsoft Cloud.
- If the Open in app option is chosen, be sure to save the document when you are finished editing from your desktop version of Word, Excel, etc. and Exit out of the document.



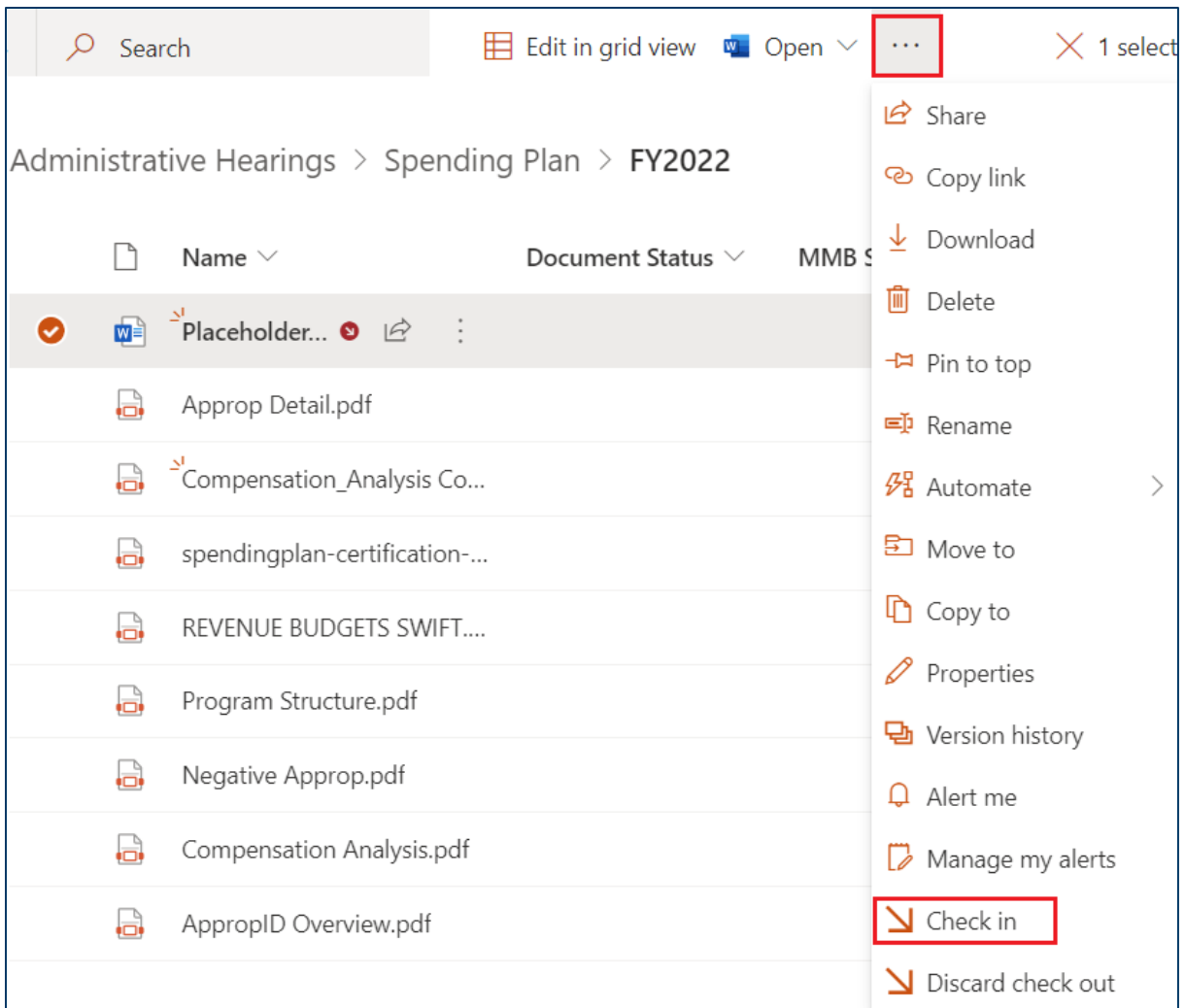
7. The application will prompt you with a message to check in your document. Select Yes. **Note:** You must check in the document before anyone else can make changes to the file.



8. A window will pop up to add comments on the edits you recently made. Version comments are optional, however, you must click "OK" - whether you add comments or not - in order to check in the document for others to edit and/or review.
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."



10. The SharePoint page typically refreshes within a matter of seconds. If not, press F5 or click the circular arrow near the top of the browser window's search bar to refresh the page.
11. The Check In button should no longer be selectable and the red Checked Out arrow should no longer be at the bottom of the document.
12. (Optional) Click on name of the file to view and make sure all changes were saved.
13. To check the document back in, select the ellipsis (three dots) and choose Check In.



14. Add comments if you wish and click the Check In button.

Check in Placeholder.docx

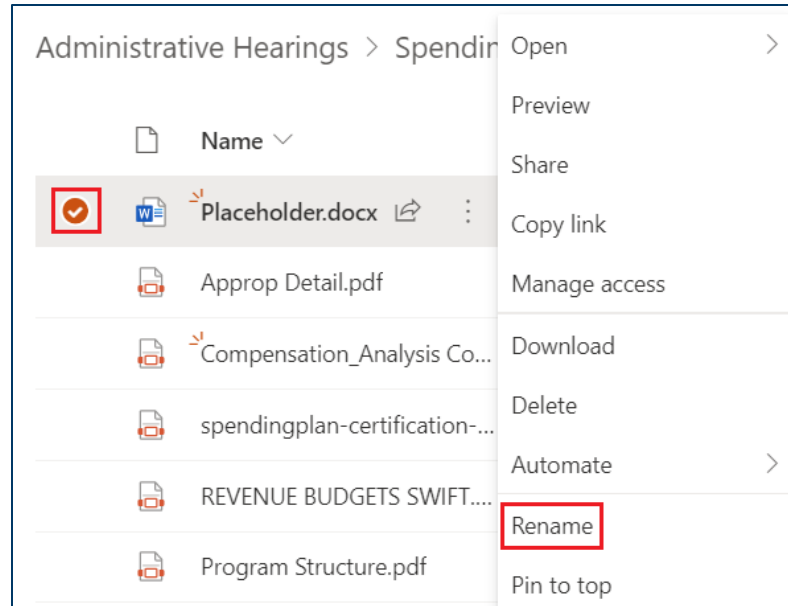
Comment

Type comments describing what has changed in this version.

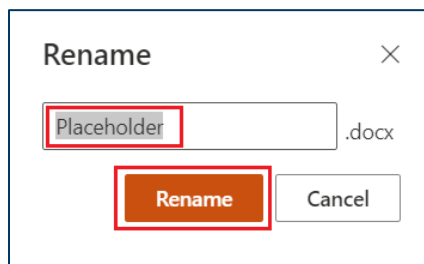
Check in

Editing Document Properties

1. To change the name or status of a document, select the document from your library's list.
2. Select the ellipsis (three dots) at the right of the document name.
3. Select the Rename option.



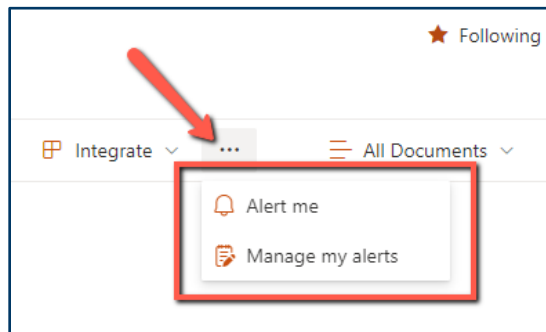
4. A pop-up screen will open with the option to rename the file or cancel. Make the appropriate changes and select Rename.



Setting Up SharePoint Alerts (Agency Folder Notifications)

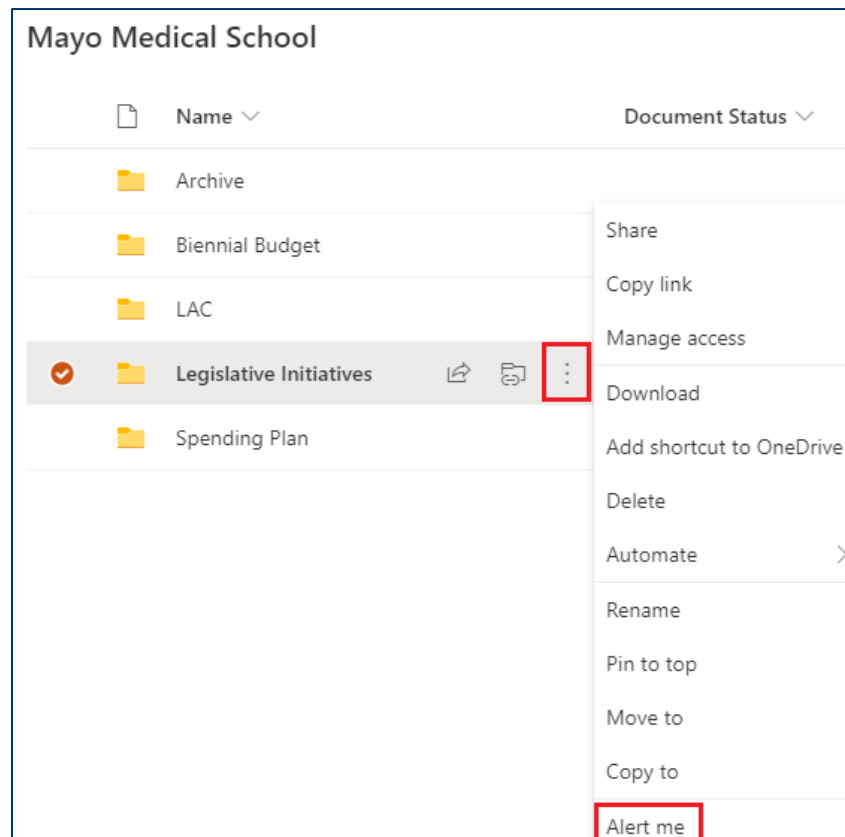
Users can [set up email notifications](#) from the Budget Division’s SharePoint site when changes are made to an entire document library or specific subfolder(s).

To be notified about all notifications for an agency’s Document Library, navigate to the ellipsis (three dots) in the upper right-hand part of the tools area.

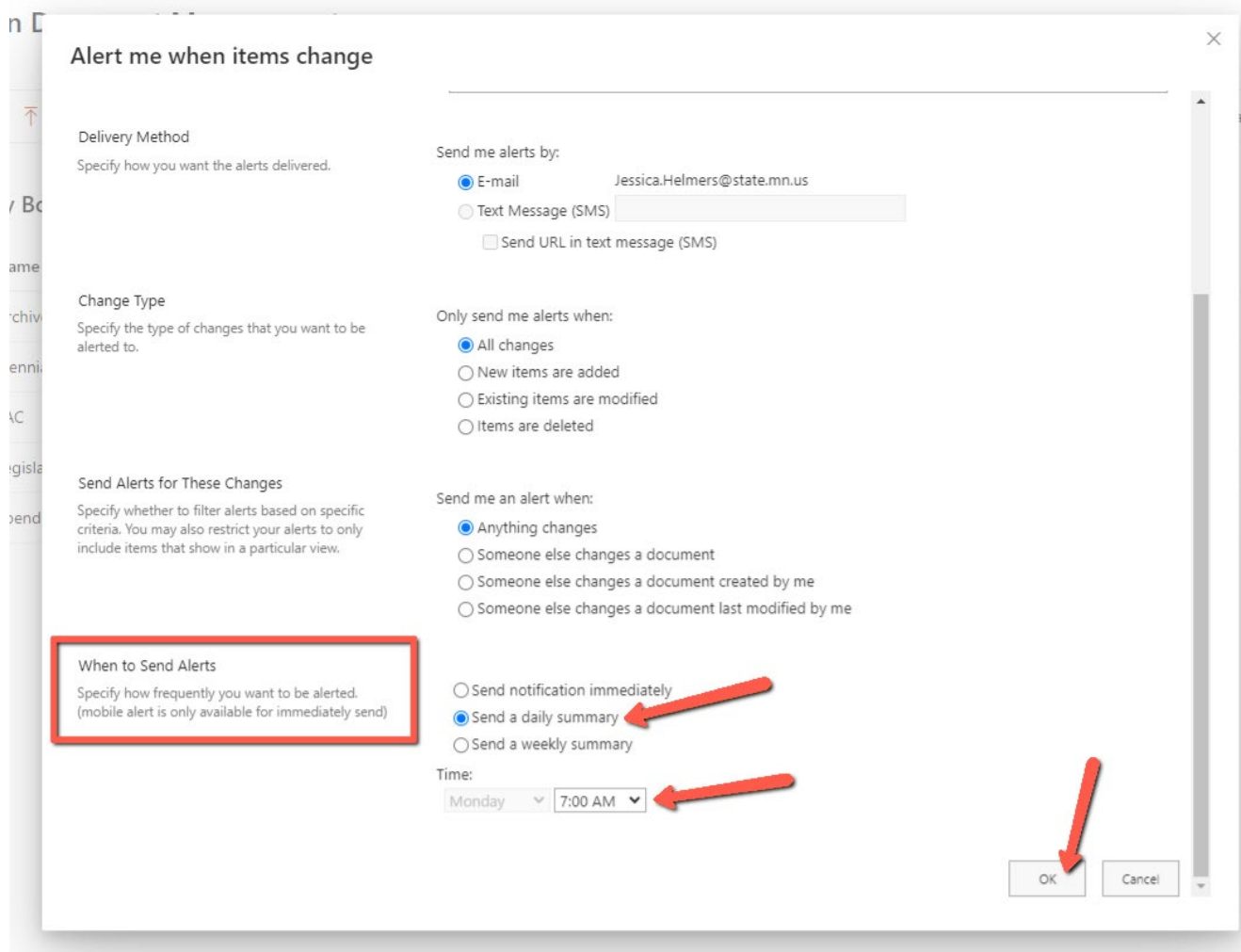


To be notified about specific folder(s) within your agency’s main Document Library:

1. Select the folder you wish to receive notifications for to your inbox or SMS (text) device.
2. Select the ellipsis (three dots) the right of the name.
3. Select Alert me.



4. Configure your Alerts preferences with the follow settings:
 - a. Send Alerts To - email address(es) to send alerts to
 - b. Delivery Method - email or text (SMS)
 - c. Change Type – creating, editing, and/or removing library items.
 - d. Send Alerts for These Changes – when someone interacts with your library items
 - e. When to Send Alerts – how frequently you receive these updates
5. Recommendation: The key setting to pay attention to is “When to Send Alerts” which determines the frequency or *how often you* (and your inbox) *receive updates* about any uploads, edits, changes, etc. to all files within your chosen folders in SharePoint.
 - a. It is best to set this to Daily or Weekly Summary depending on your role or need for visibility of activities in your agency folder(s).

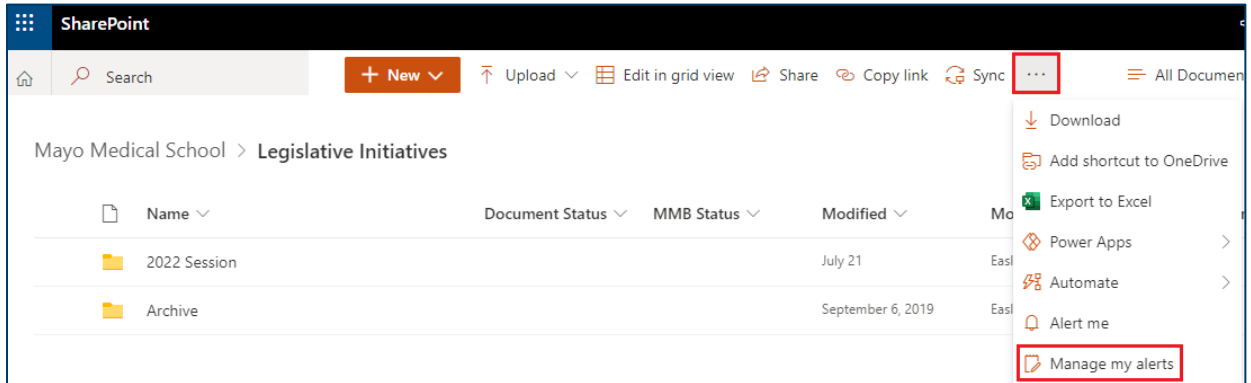


6. Click the OK button in the bottom right corner of the screen to save your Alerts (notification) settings.

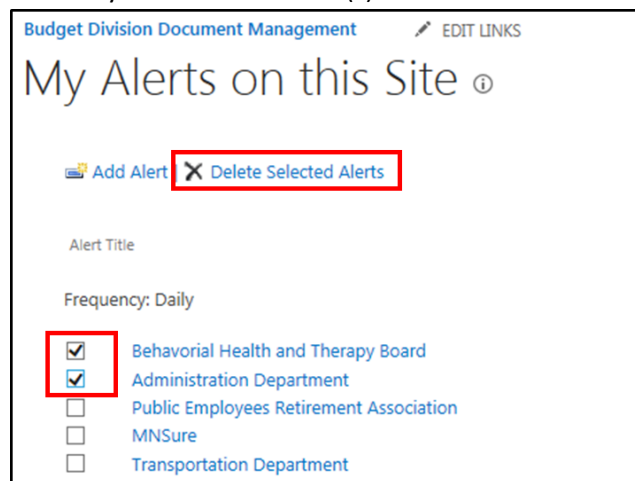
Manage Alerts (Add, Edit and Remove)

To manage your alerts:

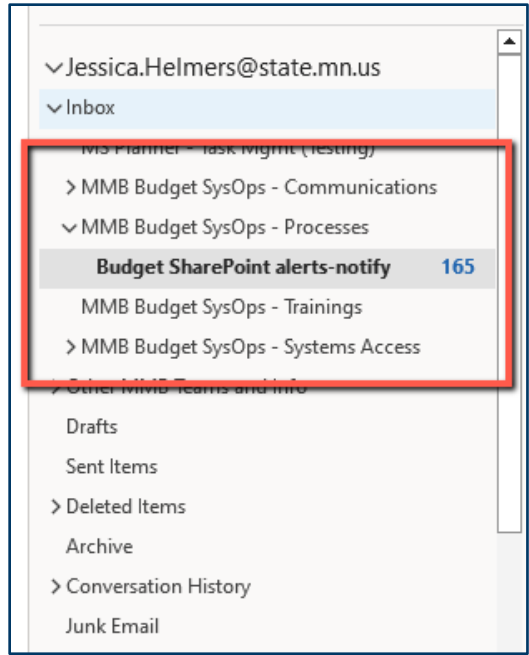
1. Click on the ellipsis (three dots) and elect “Manage my alerts.” You can add, edit, or remove Alerts (notifications) from this screen.



2. Select the alerts to delete by clicking the check box next to the library (folder) name where the alerts are monitoring changes.
3. Click on Delete Selected Alerts. You should receive a pop-up message confirming that you want to delete (deactivate) alerts for your selected folder(s).



4. Recommendation: You can then set up a Rule in Outlook (or other email service) that places all email notifications about changes to your State of Minnesota agency SharePoint folder(s) into a separate, designated subfolder within your main inbox.



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

When collaborating with external partners, the State of Minnesota (MN) often uses Microsoft Office 365 services. If you are reading this, you likely received an email invitation with a link to a State of Minnesota collaboration website. This invitation was sent to a specific email address that the State of Minnesota and Microsoft will use to verify your identity to access the Budget Division's SharePoint site. 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 Minnesota 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 Microsoft Office 365

If your employer uses Microsoft Office 365 services, your work email address is likely 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 should have direct access to the Budget Division SharePoint 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 exactly 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 do NOT have a personal Microsoft Account, you will need to create a new Microsoft account. There is no obligation to sign up for any additional Microsoft services.

- 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.
- 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/>.

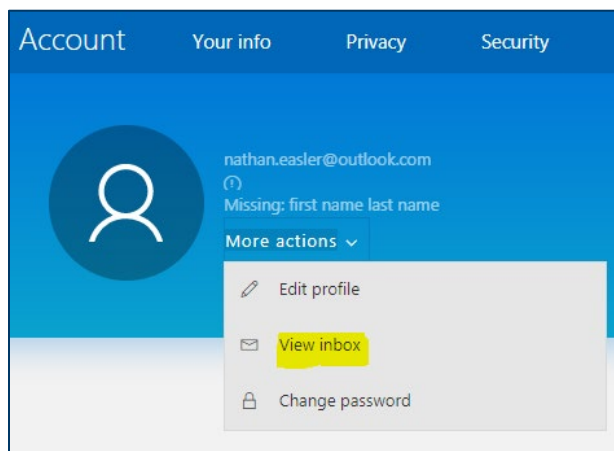
Setting Up a New Microsoft 365 Account

1. Go to the Office365 Portal website: <https://portal.office.com>
2. On the Sign in screen, select the hyperlink in the text, “No account, Create one!”

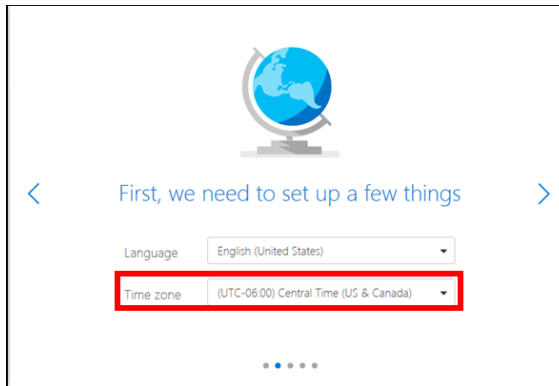
3. Fill out the required fields to create a new account.
4. Use the following naming convention: `firstname.lastname@outlook.com` in the “Create account” field.

5. Click Next and enter in a password. Note: This will be private to you and not retrievable or reset by Budget Services or other State of MN partners.
6. Microsoft may require a valid phone number that can receive an SMS text message. Much like other email or web account providers (e.g., Google, MSN, Yahoo), Microsoft uses a cell phone for account security purposes (multi-factor). If changes are made to this account, Microsoft will use this cell phone number to contact you and confirm those account settings or your identity.
7. Enter a valid phone number and click Send Code. Once you receive this code, enter the access code on the account set up screen (Add security info) and click Next.

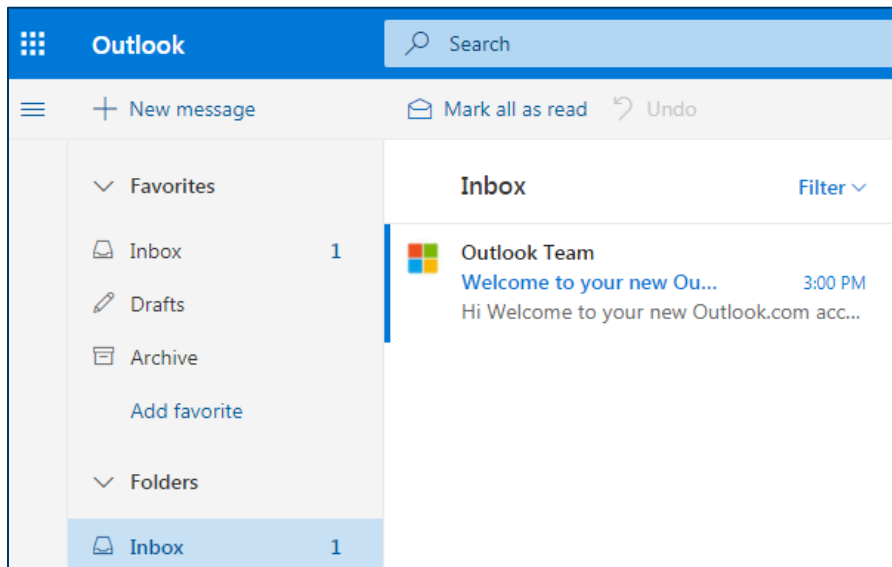
8. You have now successfully created an Office 365 account with Microsoft. The next step is to set up your inbox so you may receive the invitation to the Budget Division SharePoint site.
9. Select “More actions” from the dropdown menu and choose “View inbox.”



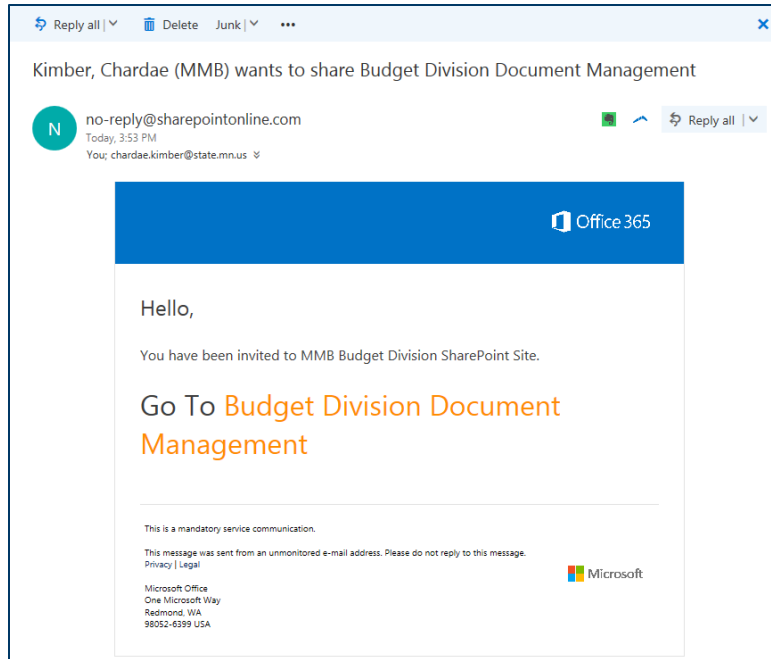
10. Set the Time Zone to Central Time.



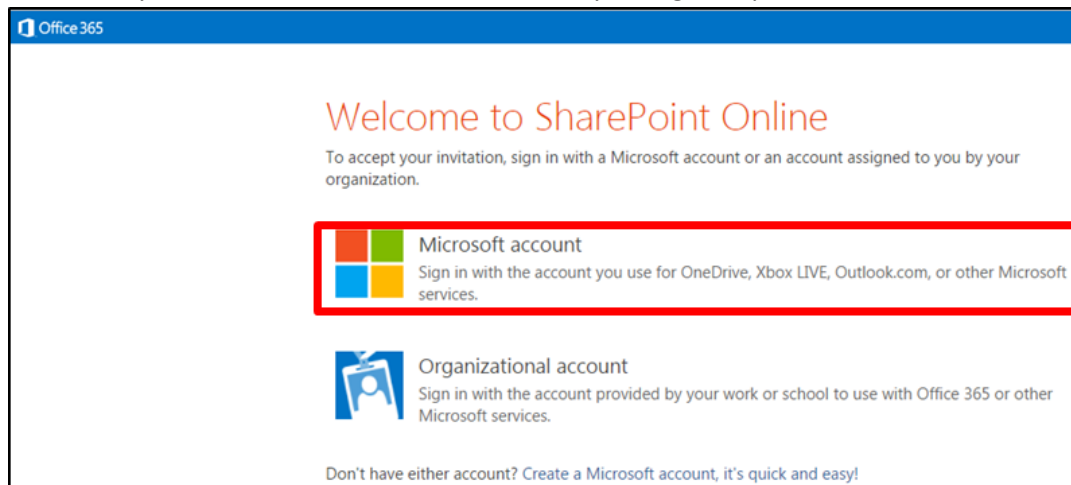
11. Once the email account in Microsoft 365 is set up, you will be taken to your Outlook inbox.



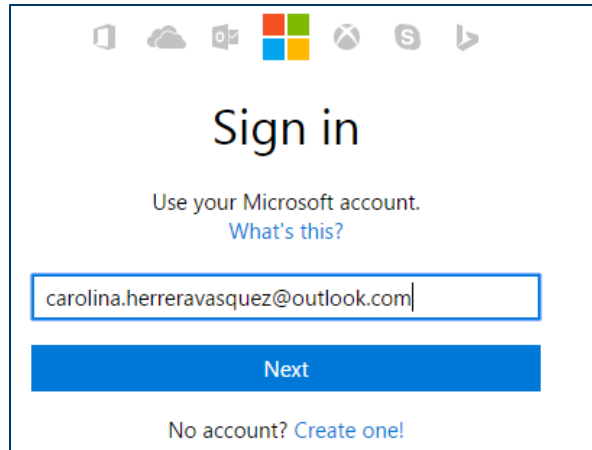
12. Send [MMB Budget Planning and Operations Team](#) your new Microsoft 365 email address (e.g., [firstname.lastname@outlook.com](#)) and then Budget Services and Operations will send you an invitation for you to access the MMB Budget Division SharePoint site to this email address.
13. If you have not already, be sure to log into your Microsoft account: <https://portal.office.com>
14. Click on the email that you receive from "MMB Budget Operations" and it will direct you to the MMB Budget Division SharePoint Site.



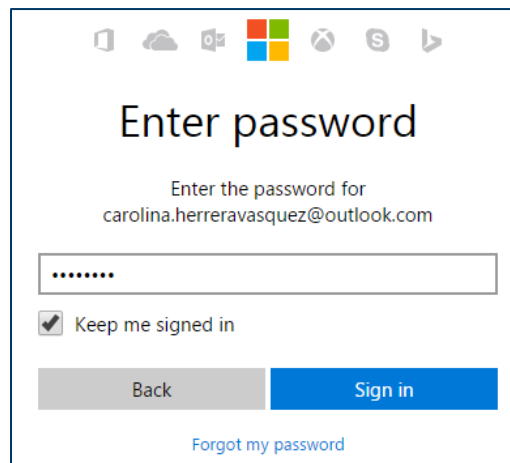
15. Once you select the hyperlink in the email, it will bring you to a “Welcome to SharePoint Online” screen where you will select “Microsoft account” as your sign in option.



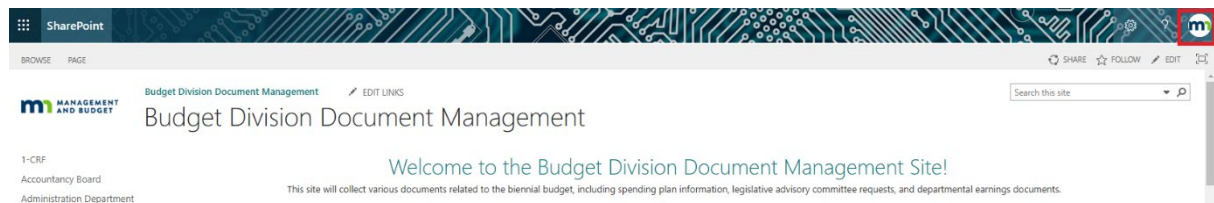
16. Sign in using your Microsoft 365 (Outlook) email address (e.g., firstname.lastname@outlook.com).



17. Enter in your password, select the “Keep me signed in” option, then select “Sign in.”



18. Once you log in, you should see your user profile icon in the upper right-hand corner of the SharePoint site screen and/or your specific agency information.



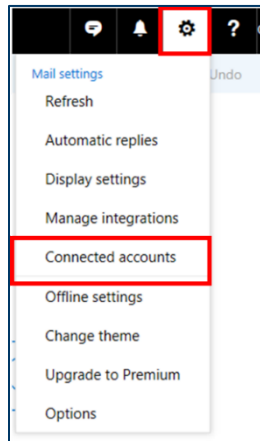
Need help?

[Contact Microsoft directly](#) if there are problems with your external Microsoft 365 Account. If your Microsoft 365 account appears to be working correctly, but you still cannot collaborate with partners at the State of Minnesota, contact budget.finance.mmb@state.mn.us and ask to verify that both account profiles are referring to the same email address (e.g., firstname.lastname@outlook.com) when sending and accepting collaboration invitations in SharePoint.

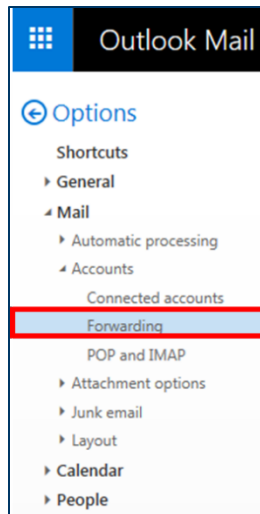
Alerts from your Microsoft 365 account

If you plan on setting an alert for folders in your agency’s SharePoint library, notifications will be sent to your Microsoft 365 account email. To redirect these emails, you will need to forward all emails to your employee email address or other account(s).

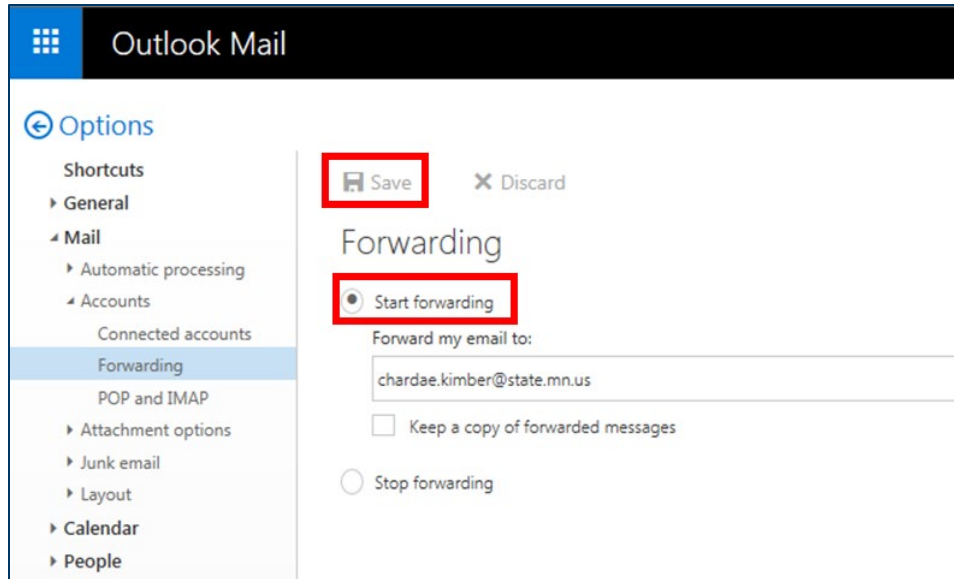
1. In your Microsoft 365 account email, go to your inbox and select the Settings cog in the top right-hand side and select Connected Accounts.



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 settings from the SharePoint site will be sent to your employee email address or other account(s). You can then [set up a Rule in your Outlook mail](#) that places all emails that are forwarded from your Microsoft 365 account into a separate folder in your main inbox.