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SharePoint User Guide

Navigation & Utilization in SharePoint



Welcome

About SharePoint

SharePoint is a secure place to store, organize, share and access information. It will be used as a document repository for incoming applications. Applications will be transferred from the centralized Cognito to SharePoint for application processing.

What you can do with SharePoint:

- ✓ Open and view documents online
- ✓ Organize and maintain documents and folders
- ✓ Collaborate with colleagues – share documents
- ✓ See version history – monitor who updated or touched a file/folder and when
- ✓ Search – documents, people
- ✓ Set permissions for specific files or folders

About This Guide

This document walks through using the SharePoint platform. Follow this guide for instructions and best practices for working in SharePoint to process Central Applications.

Still have Questions?

Several resources are available to help you learn:

1. Your Resources posted on the [RAA Resource Portal](#) under [Central Application](#)
2. Direct policy and process questions to your supervisor who can contact the RAA support inbox, if necessary, (dhcdraaft@mass.gov) as a point of escalation for questions.
3. For Central App technical issues, please submit a ticket via your Central App portal account.

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Getting Started



Getting Started

Browser

Browsers such as Chrome, Firefox and Microsoft Edge (Chromium) are fully supported for SharePoint online. Use one of these browsers for the best experience with the platform.

Access/Login

Users can access the RAA-specific SharePoint. If you have questions about gaining access, contact your supervisor or your IT department.

Bookmarking

As a best practice, bookmark the SharePoint page in your preferred browser as a means of easy access for use on a regular basis. Bookmarking holds the place for a web page, allowing for quick access instead of searching for it. Clicking the bookmark directs you to the desired page immediately.

Learn more here: <https://mycomputerworks.com/how-to-bookmark-webpages-browser/>

Notice these call-out icons in the document



Pay Attention! This is an important reminder



Best Practice. This will show you a valuable tip

SharePoint Basics



SharePoint Overview

SharePoint is the tool used to store and save Central Applications and corresponding attachments. SharePoint is a Microsoft Office tool. To access the applications in SharePoint, login using the agency's credentials.

To access SharePoint, use a preferred web browser; the view will be similar to what is shown below.

The following pages will dive deeper into the structure and functionality within SharePoint.

The screenshot displays the SharePoint 'Central App' document library. The interface includes a left-hand navigation pane with options like Home, Conversations, Documents, Shared with us, Notebook, Pages, Site contents, Recycle bin, and Edit. The main area shows a list of documents with the following columns: Name, Modified, Modified By, Created, Application ID, Language, Living Situation, and City. The documents are organized into folders, including 'Testing' and several folders named 'ME10167_Neighbor_Dave', 'ME10166_Schrute_Dwight', 'ME10165_Halpert_Jim', and 'ME10164_Scott_Michael'.

Name	Modified	Modified By	Created	Application ID	Language	Living Situation	City
Testing	40 minutes ago	Rowan, Angela	40 minutes ago				
ME10167_Neighbor_Dave	5 hours ago	Sammy Rosario	5 hours ago	ME10167	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull
ME10166_Schrute_Dwight	5 hours ago	Sammy Rosario	5 hours ago	ME10166	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull
ME10165_Halpert_Jim	5 hours ago	Sammy Rosario	5 hours ago	ME10165	English	Homeowner: Living in your home, and looking for help paying your mortgage to remain in your home or help with other housing costs.	Hull
ME10164_Scott_Michael	5 hours ago	Sammy Rosario	5 hours ago	ME10164	English	Renter Staying: Renting your apartment/home, and looking for help to	Hull

Naming Conventions & Folder Structure

SharePoint is set up with a folder hierarchy structure.

Applications and documents submitted via the central app will be transferred to SharePoint. The following are the naming conventions and folder structure.

Naming Convention



File

Application ID_Full Name



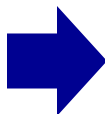
Individual Document

Application ID_Full Name_Document Type

Folder Structure

Documents and applications are automatically transferred to a folder that has the **Application ID** and **Name**

MA12867_John Doe
ME1802_Jane Smith



ME1802_Jane Smith_Application
ME1802_Jane Smith_ID
+ Other Docs

SharePoint Structure

One benefit of SharePoint is the ability to use columns to view specific information for each application. As part of the transfer process, a few columns have been prepopulated in addition to the **Document Name**; for example, the **Application ID**, **Living Situation**, and **City**.

Additional columns were created to be used by RAA staff to make assignments and track application status.

1. Each application will have a folder with the **unique application ID** and the **applicant's name**
2. Certain columns will come **prepopulated** as part of the data transfer while certain columns may be used by staff to update the status of the application

Name	Modified	Modified By	Created	Application ID	Language	Living Situation	City	Case Manager
ME10162_test_test	About an hour ago	Veronica Wright	Yesterday at 8:59 AM	ME10162	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	
ME10159_SixtyThree-Dupe...	About an hour ago	Michelle Santos	Yesterday at 1:02 PM	ME10159	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson	Michelle Santos
ME10160_SixtyThree-Dupe...	6 hours ago	Matchett, Kaley	Tuesday at 7:56 AM	ME10160	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson	Michelle Santos
ME10164_Scott_Michael	6 hours ago	Matchett, Kaley	Yesterday at 9:00 AM	ME10164	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	Michelle Santos
ME10166_Schrute_Dwight	About an hour ago	Michelle Santos	Yesterday at 9:04 AM	ME10166	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	Michelle Santos



DO NOT CHANGE, RENAME, OR MOVE COLUMNS

SharePoint Tools



Taskbar

1

2

3

4

5

6

+ New ▾

↑ Upload ▾

📄 Edit in grid view

🔗 Share

🔗 Copy link

🔄 Sync

⋮

☰ All Documents ▾

🔍

	Tool	Description	Recommended Use
1	New	Create a new document (multiple file types can be created (e.g., word))	Do Not Use
2	Upload	Upload new documents (e.g., additional documents the client has shared)	Do Not Use
3	Edit in Grid View	Appears like an Excel sheet to allow fields in rows and columns to be edited	Use to update fields to help manage and process cases (e.g., status updates or responsible case manager)
4	Share	Share a link to a person or group that they can use to access the file, folder or list item.	Use to share a file/folder with a colleague (e.g., if a supervisor or another case manager is assisting)
5	Copy Link	A link to the file or documentation which can be shared or used to reference easily	Use to access the file easily (e.g., adding a link to a review form)
6	Filter	Allows the user to sort the folders and files by multiple fields (e.g., creation date, modification date, case status, etc.)	Use to hide files from view that may not be relevant per person. (e.g., filter cases by case manager)

 **SharePoint Links are only accessible to others who have access to the SharePoint.**

Grouping & Filtering

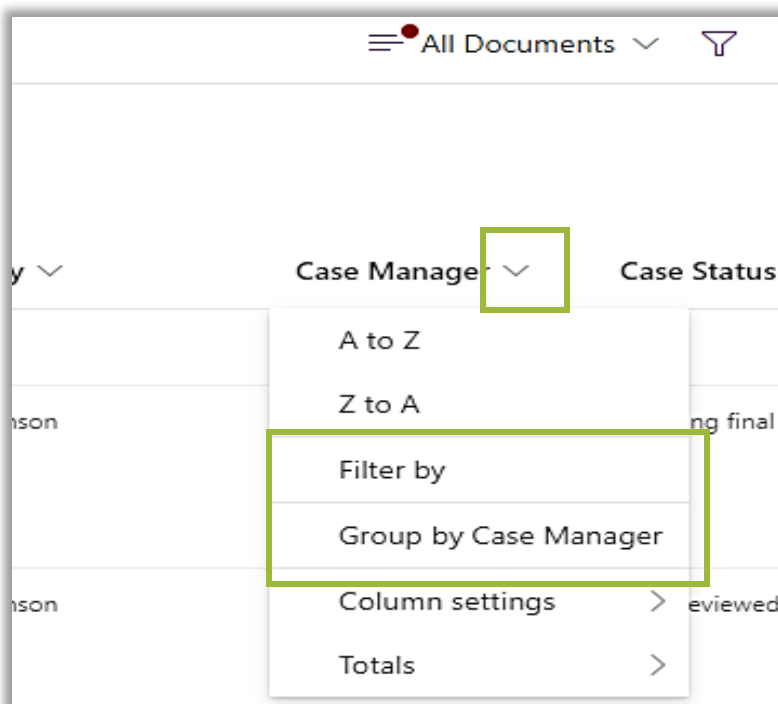
All RAA applications will be transferred through SharePoint and visible to all staff who have access. **Grouping** and **Filtering** are functions to help organize and/or streamline application processing.

Group by	clusters the folders by the selected column; this view will show all folders in groups with sub-headers indicating the details of the groups
Filter by	opens a selection screen, to select one or multiple items to filter by, this view will then only show the specific folders that have that information, while hiding the other folders that do not meet the filter criteria.

1. To **filter** or **group** the folders/files, select the arrow to the right of the column being filtered.



Filtering only displays the information selected



Filter By

Columns can be **filtered** to easily view only specific applications that meet the selected criteria allowing case managers and managers to create their own view for specific folders.

FILTER BASICS

- Multiple filters may be applied at one time to narrow down results further.
- Filtering hides those items from view which do not fit the filter criteria. *Please note, items are not removed but only hidden while the filter is active.*
- Setting a filter will apply that filter for all files within that folder

Name	Modified	Modified By	Created	Application ID	Language	Living Situation	City	Case Manager	Case Status	Chaser
ME10160_SixtyThree-Dupe...	About a minute ago	Matchett, Kaley	Tuesday at 7:56 AM	ME10160	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson	Michelle Santos	Staff reviewed	
ME10165_Halpert_Jim	About a minute ago	Matchett, Kaley	Yesterday at 9:03 AM	ME10165	English	Homeowner: Living in your home, and looking for help paying your mortgage to remain in your home or help with other housing costs.	Hull	Mike Halter	Staff reviewed	
ME10166_Schrute_Dwight	About a minute ago	Matchett, Kaley	Yesterday at 9:04 AM	ME10166	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	Mike Halter	Staff reviewed	



EXAMPLE: RAA staff can use the **filter** function to sort cases by fields such as “**case manager**” and/or “**case status**”

If the case manager is using the “Filter by” option, there is one additional step to take in order to view docs within the folder. Once the case manager clicks on an applicant folder, they will need to un-filter to see the documents in the application folder by clicking on the Application’s Folder Name.

Name	Modified	Modified By
------	----------	-------------

Group By

The grouping function will add sub-headers to indicate the groups.
Only one column can be grouped at a time.

The sub-headers will include the:

- column name
- group name
- count of files/folders within that group

The files within that group will be below the heading

Public group 7 members

+ New Upload Sync Export to Excel Power Apps Automate

All Documents*

Documents

Name	Modified	Modified By	Created	Application ID	Language	Living Situation	City	Case Manager	Case Status
Case Manager : Michelle Santos (3)									
ME10159_SixtyThree-Dupe...	About a minute ago	Matchett, Kaley	Tuesday at 7:54 AM	ME10159	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson	Michelle Santos	Awaiting final approval
ME10160_SixtyThree-Dupe...	About a minute ago	Matchett, Kaley	Tuesday at 7:56 AM	ME10160	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson	Michelle Santos	Staff reviewed
ME10164_Scott_Michael	About a minute ago	Matchett, Kaley	Yesterday at 9:00 AM	ME10164	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	Michelle Santos	Timed out
Case Manager : Mike Halter (3)									
ME10162_test_test	About a minute ago	Matchett, Kaley	Yesterday at 8:59 AM	ME10162	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull	Mike Halter	Approved
ME10165_Halpert_Jim	About a minute ago	Matchett, Kaley	Yesterday at 9:03 AM	ME10165	English	Homeowner: Living in your home, and looking for help paying your mortgage to remain in your home or help with other housing costs.	Hull	Mike Halter	Staff reviewed
ME10166_Schrute_Dwight	About a minute ago	Matchett, Kaley	Yesterday at 9:04 AM	ME10166	English	Renter Staying: Renting your apartment/home	Hull	Mike Halter	Staff reviewed



EXAMPLE: RAA staff can use the “Group By” function to see the cases by “Case Manager”

Edit in Grid View


RAAs will be responsible for updating certain fields, like **Case Manager assignment** and **Case Status**, to help track cases.

Steps to Edit in Grid View:

1. To update the fields in a particular column in order to report on **status** or add a **closure date**. Click **Edit in Grid View**
2. Under the desired column:
 - a. Select from the drop-down options, making sure to click on the desired drop-down option; OR
 - b. Type in the field to enter information about the application
3. Once all information has been updated click **Exit Grid view**

Note: Exiting grid view will automatically save updates







1

 Edit in grid view  Sync  Export to Excel  Power Apps  Automate 

2







Name	Modified	Modified By	Created	Application ID	Language	Living Situation	City	Case Manager	Case Status
OT_Reports	July 8	Gomez, Andres B.	July 8						
ME10159_SixtyThree-Dupe_Defect	4 hours ago	Sammy Rosario	Tuesday at 7:54 AM	ME10159	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson		
ME10160_SixtyThree-Dupe_Defect	4 hours ago	Sammy Rosario	Tuesday at 7:56 AM	ME10160	English	Moving: I need to leave where I am currently staying (i.e., homeless, couch surfing, or living in unsafe conditions).	Hanson		
ME10161_Test_PNVHS	4 hours ago	Sammy Rosario	Tuesday at 9:51 AM	ME10161	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Wareham		
ME10162_test_test	4 hours ago	Sammy Rosario	4 hours ago	ME10162	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull		
ME10164_Scott_Michael	4 hours ago	Sammy Rosario	4 hours ago	ME10164	English	Renter Staying: Renting your apartment/home, and looking for help to stay in the same place.	Hull		

3

 Exit grid view  Undo  Sync  Export to Excel  Automate 

Modification Information

In addition to version history every time a folder or file is opened, or modified SharePoint records the date and the user information. This modified record keeping is visible for every folder and every file saved in SharePoint.

	Name ▾	Modified ▾	Modified By ▾	Created ▾
	01_Reports	July 8	Gomez, Andres B.	July 8
	 ME10164_Scott_Michael	48 minutes ago	Matchett, Kaley	Yesterday at 9:00 AM
	 ME10165_Halpert_Jim	48 minutes ago	Matchett, Kaley	Yesterday at 9:03 AM

Modified shows the last date/time which the file had changes made

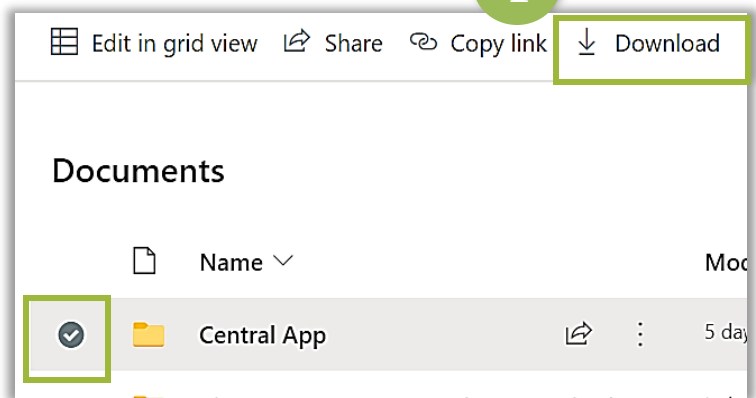
Modified By indicates the individual who last updated the file

Created reflects the date which the folder was transferred into the RAA's SharePoint

Downloading Folders/Files

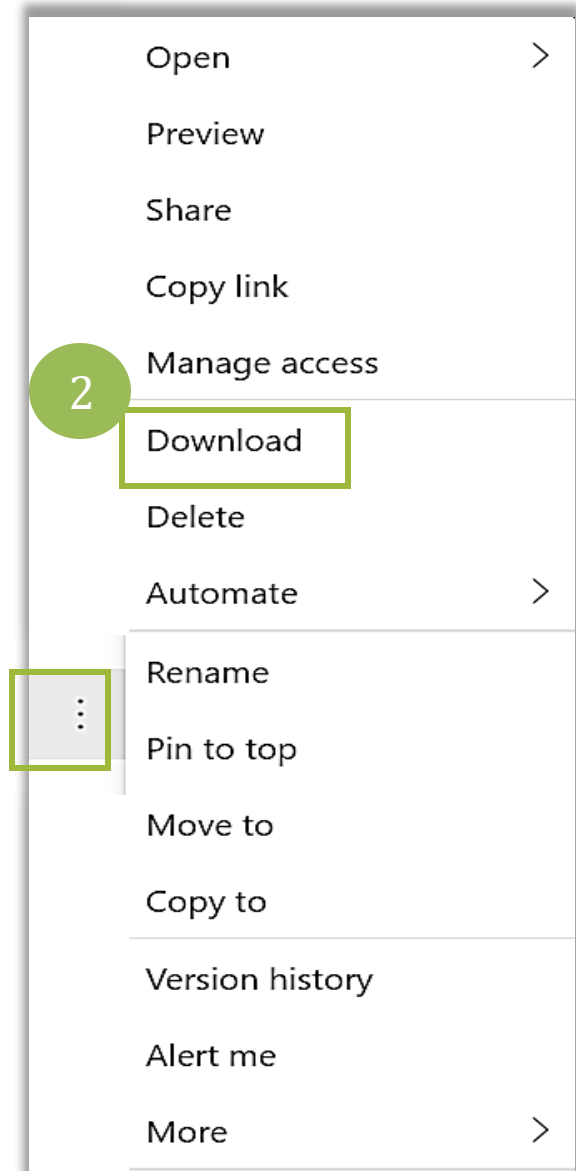


It is best practice to keep files on the SharePoint in one central and secure location.



In rare circumstances, when the **Download** feature is needed, follow either of these ways:

- **Select a file or folder.** This adjusts the **task bar** at the top to provide additional action items, such as **download**. After selecting Download, the item will save to the computer's download folder.
- Alternatively, click the **three dots** icon next to the document name which opens the **menu**. From there, the **download** option can be selected.



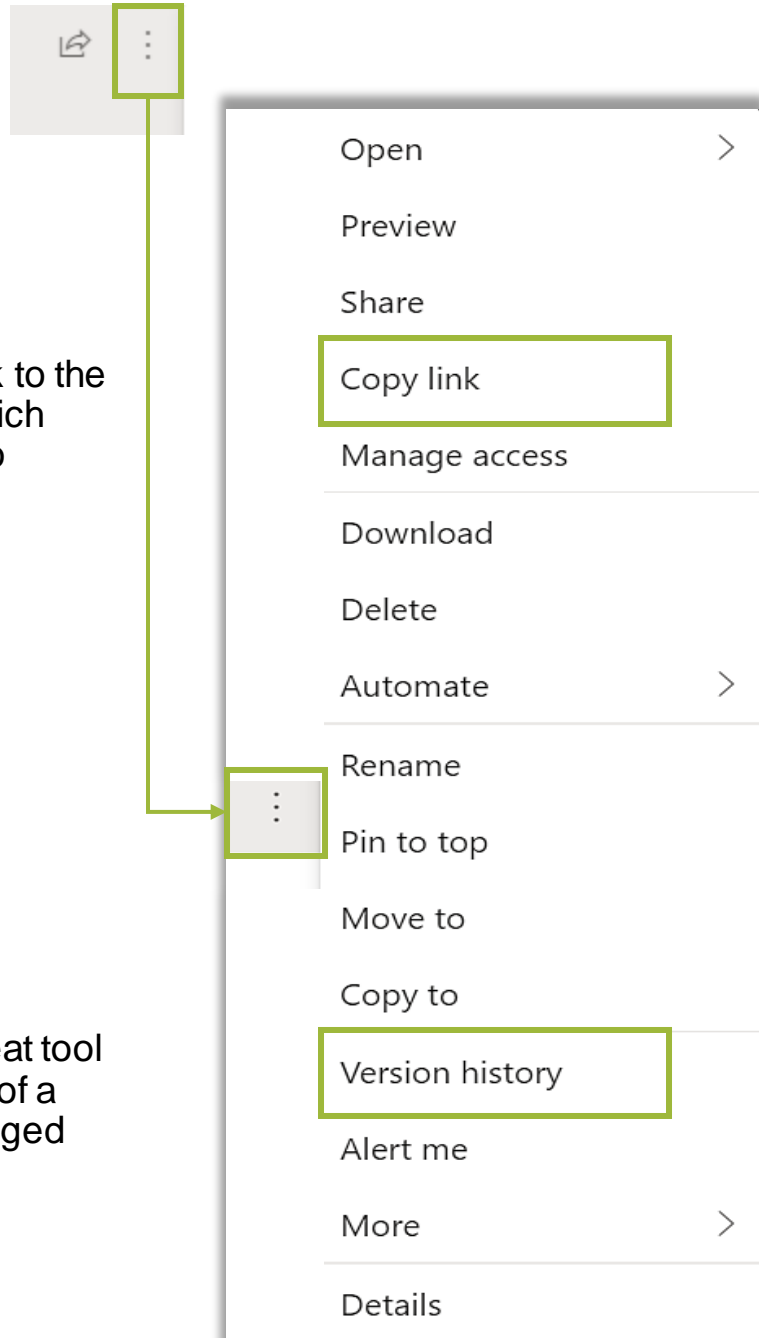
Menu

There is a menu that opens for each folder and file after clicking the three dots. There are many options in the menu (see image below) to select from but for Central App processing only a few will be used.

Clicking the **three dots (vertical ellipses)** icon next to the document name opens the folder/file **menu**.

Copy Link creates a link to the file or documentation which can be shared or used to reference easily

Version History is a great tool to access prior versions of a file which has been changed or modified



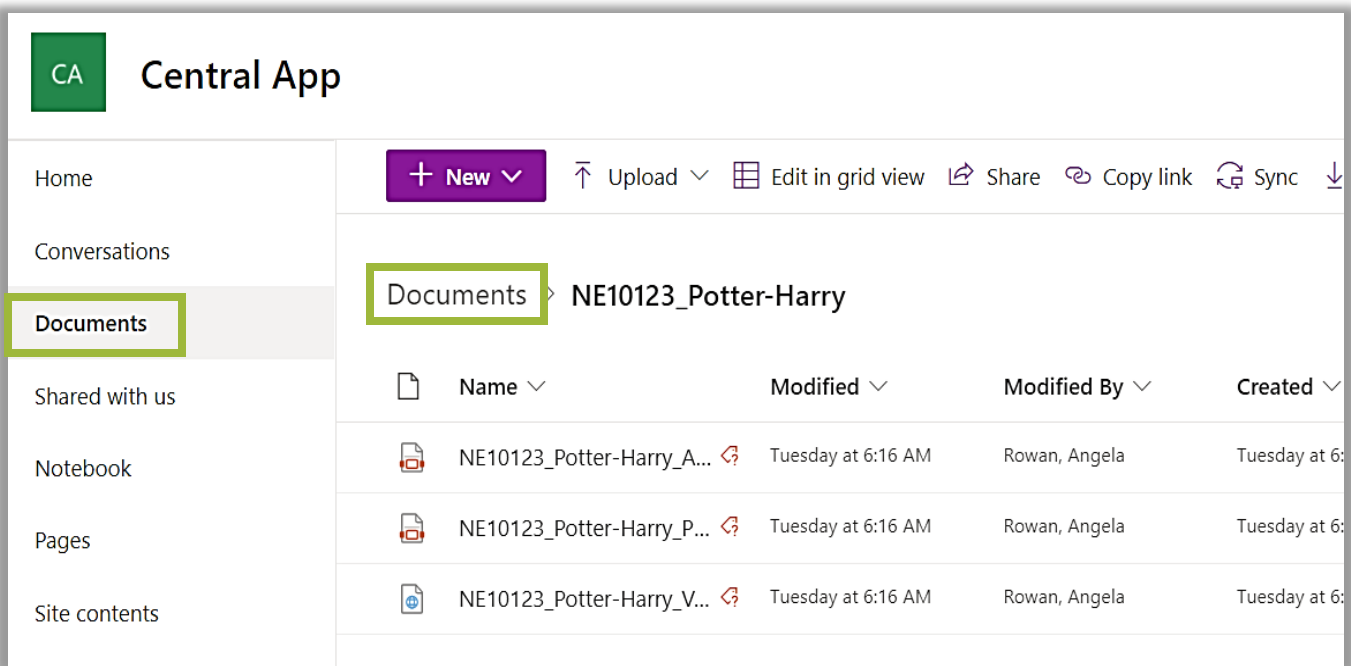
Viewing Documents / Navigation



Viewing Documents / Navigation

Select the folder to open the documents within the application folder by clicking on the specific folder name. It will allow access to a PDF version of the application as well as all documents submitted via the application and new documents from the "Upload Documents" tile on the Portal.

To go back to the previous page, click **Documents** on either location on the navigation bar to return to view all of the applicant folders



Central App

Home

Conversations

Documents

Shared with us

Notebook

Pages

Site contents

+ New **Upload** **Edit in grid view** **Share** **Copy link** **Sync**

Documents > **NE10123_Potter-Harry**

Name	Modified	Modified By	Created
NE10123_Potter-Harry_A...	Tuesday at 6:16 AM	Rowan, Angela	Tuesday at 6:16 AM
NE10123_Potter-Harry_P...	Tuesday at 6:16 AM	Rowan, Angela	Tuesday at 6:16 AM
NE10123_Potter-Harry_V...	Tuesday at 6:16 AM	Rowan, Angela	Tuesday at 6:16 AM



Clicking the back arrow in the browser rather than clicking documents retain the grouped by or the filter chosen, rather than having to refilter the SharePoint each time

Viewing Documents

Selecting the document opens a viewing screen as shown below.

The application will open as a PDF in a form similar to the example shown.

To exit the view, click the “X” in the upper right corner to return to the applicant folder.

ShareCopy linkDownloadDeleteView originalCopy toVersion history1 of 4Next>X

CT V9

Applicant Name:	Johnny Appleseed	Applicant #	ME10062
Language	English	Applicant Type	Applicant
SSN	000-11-1232		
Address	658 E Broadway, South Boston, Massachusetts 02127		
Email	test1234@gmail.com-		
Phone	(123) 456-7890 Type Home Type Consent		
Phone 2	Type Home Type Consent		
Mailing			

Applicant Responses

Name	Relationship	DOB	Race	Ethnicity	Gender	Income
Johnny Appleseed	HOH	6/18/2000	White	Not Hispanic or Latino	Male	Do you have income?
	Type of Income / Other	Frequency	Amount	Annual Income		
	Wages/Employment	Biweekly (Every other week)	\$1,000.00	\$28,000.00		
Applicant's Annual Income: \$28,000.00						

Additional Members

I have additional household members living with me

Members

Name	Relationship	DOB	Age	Sex	Ethnicity	SSN
Jane Appleseed	Spouse	6/1/2000	21	Female	Not Hispanic or Latino	
Does this member have income?	Please confirm you have no income					
Yes	Yes					

Department of Housing and Community Development

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Reminders & Resources



Reminders

- ☒ Do Not Upload documents or files directly to SharePoint
- ☒ Do Not Delete any files or folders
- ☒ Do Not Touch or Edit folders or files assigned to other staff (unless asked)
- ☒ Do Leverage Filters to see specific application assignments while hiding the rest
- ☒ Do Update the Status Column regularly to manage and track case progress
- ☒ Do Copy or Share Links with managers or colleagues to share folders or files securely



Additional Resources

There are several Microsoft SharePoint learning tools available online. The following resource links may be helpful to learn more about SharePoint and its functionality.

- [Microsoft SharePoint Support](#)
- [Microsoft SharePoint Training Videos](#)
- Topics of interest:
 - [Grouping](#)
 - [Filtering](#)
 - [Sorting](#)

Still have Questions?

Several resources are available to help deepen learning:

1. Resources posted on the [RAA Resource Portal](#) under [Central Application](#)
2. Direct policy and process questions to a supervisor who can contact the RAA support inbox, if necessary, (dhcdraaraft@mass.gov) as a point of escalations for questions.
3. For Central App technical issues, please submit a ticket while logged in to the Central App portal account. Be sure to include as much information as possible (e.g., Application ID).