



SharePoint Training

CALIFORNIA SCHOOL-BASED MEDICAL ADMINISTRATIVE ACTIVITIES (SBMAA)

Department of Health Care Services
Safety Financing Division
2/12/2014

Agenda

- ▶ Overview of SharePoint Collaboration Site
 - Accessing SharePoint

- ▶ Group Learning Exercise
 - Navigating SharePoint site
 - Creating a new folder
 - Uploading files

- ▶ Registering for SharePoint

Overview of SharePoint Collaboration Site

- ▶ Web-Based Portal
- ▶ Work closely with our stakeholders
- ▶ Events
- ▶ Data Library (1 80 Days)
- ▶ No Personal Information
(PI)/Protected Health Information
(PHI)

Accessing SharePoint

- ▶ **Web-Browser (Internet Explorer, Chrome, Firefox).**
- ▶ **SharePoint Account**
- ▶ **SharePoint Access**
 - Assigned unique URL address
 - Access to your region's folder

Accessing SharePoint Continue...

Folder Location

Your Region

Active user

The screenshot shows a SharePoint library interface. At the top right, the user name 'Yanes, Francisco' is circled in orange. A purple oval highlights the breadcrumb path: 'Administrative Claiming Local and School Services > SMAA > ... Contra Costa > All Documents'. A green arrow points from the text 'Folder Location' to the 'SMAA' part of the path. Another green arrow points from 'Your Region' to the '... Contra Costa' part. In the main content area, a table lists folders:

Type	Name	Modified	Modified By
Folder	IC	1/23/2014 10:11 AM	Yanes, Francisco
Folder	RTC	1/23/2014 10:12 AM	Yanes, Francisco

The 'IC' folder name is circled in red, and the 'RTC' folder name is circled in blue. A green arrow points from the text 'Interim Claiming folder' to the 'IC' folder. Another green arrow points from 'Reasonableness Test Criteria folder' to the 'RTC' folder. On the left sidebar, the 'Add document' button is circled in blue, with a green arrow pointing from the text 'Add documents' to it.

Group Learning Exercise

- ▶ Contra Costa LEC – ABC USD Interim Claiming Documents for Fiscal Year 2013/2014 Quarter 2




Administrative Claiming Local and School Services > SMAA > ... Contra Costa > All Documents

Type	Name	Modified	Modified By
Folder	IC	1/23/2014 10:11 AM	Yanes,Francisco
Folder	RTC	1/23/2014 10:12 AM	Yanes,Francisco

Select IC

Group Learning Exercise Continue...

Contra Costa LEC – Interim Claiming Documents for Fiscal Year 2013/2014 Quarter 2 for ABC USD

Type	Name	Modified
	13_14_2	1/23/2014 10:12 AM
	13_14_3	1/23/2014 10:12 AM
	13_14_4	1/23/2014 10:12 AM

Select 13_14_2

Group Learning Exercise Continue...

- ▶ This directory will be empty upon first visit
- ▶ You will need to create a new folder for your claiming unit's files

The screenshot displays a SharePoint document library interface. At the top, the navigation bar includes 'Site Actions', 'Browse', 'Documents', and 'Library'. The user 'Yanes, Francisco' is logged in. The breadcrumb path is 'Administrative Claiming Local and School Services > SMAA > ... 13_14_2 > All Documents'. A search bar is present with the text 'Search this site...'. On the left, a 'Libraries' sidebar lists 'Shared Documents', 'SMAA' (selected), 'Lists', 'Calendar', 'Tasks', 'Discussions', and 'Team Discussion'. The main content area shows a table with columns 'Type', 'Name', 'Modified', and 'Modified By'. Below the table, a message states: 'There are no items to show in this view of the "SMAA" document library.'

Type	Name	Modified	Modified By
There are no items to show in this view of the "SMAA" document library.			

Group Learning Exercise Continue...

- ▶ This directory will be empty upon first visit
- ▶ You will need to create a new folder for your claiming unit's files

Site Actions ▾ [Browse](#) **Library Tools** [Documents](#) [Library](#) Yanes, Francisco ▾

[Administrative Claiming Local and School Services](#) > [SMAA](#) > ... [13_14_2](#) > [All Documents](#) ▾

Search this site... [?](#)

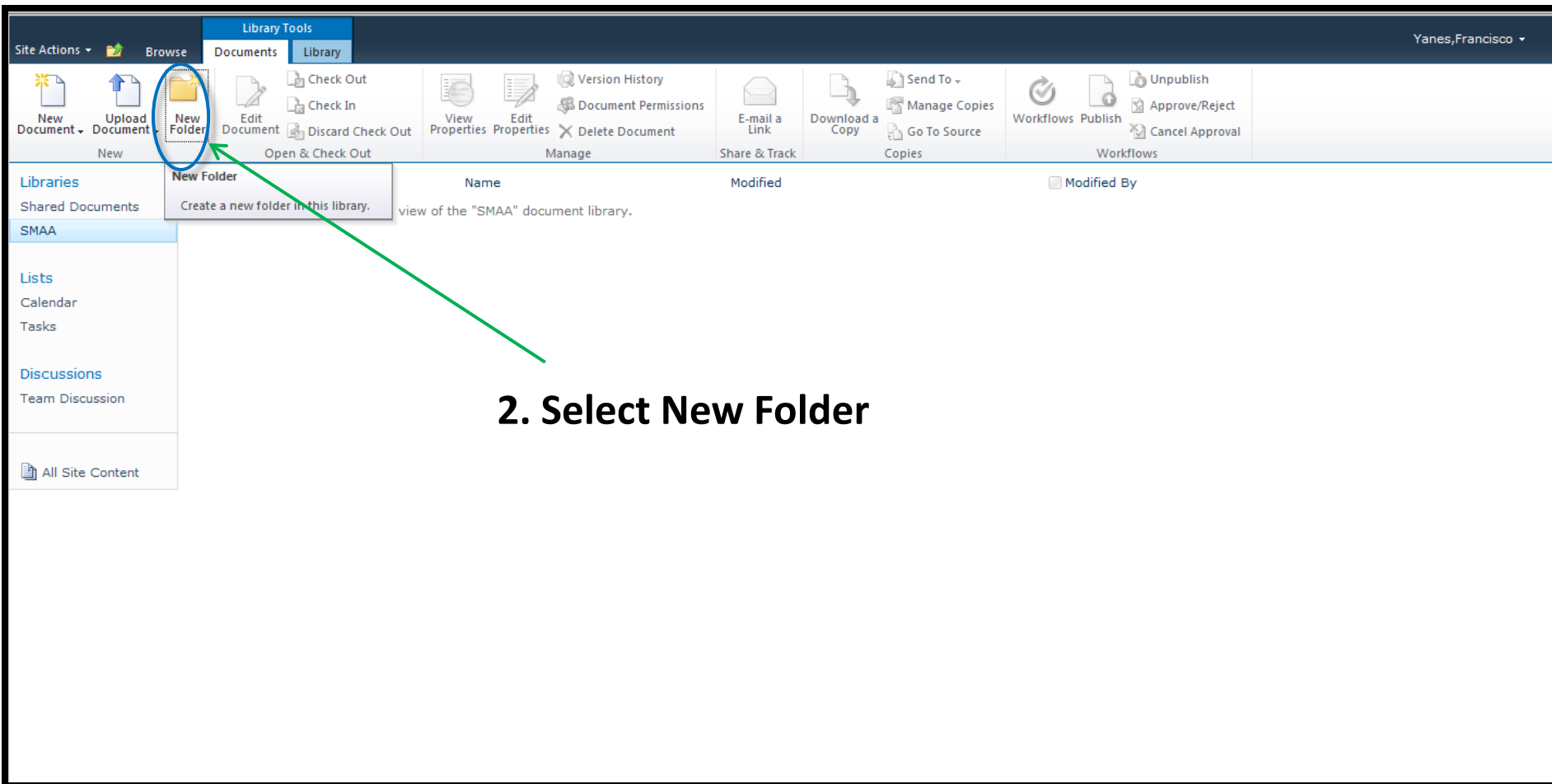
<input type="checkbox"/>	Type	Name	Modified	<input type="checkbox"/>	Modified By
There are no items to show in this view of the "SMAA" document library.					

1. Select documents

Libraries

- Shared Documents
- SMAA**
- Lists
 - Calendar
 - Tasks
- Discussions
 - Team Discussion
- All Site Content

Group Learning Exercise Continue...

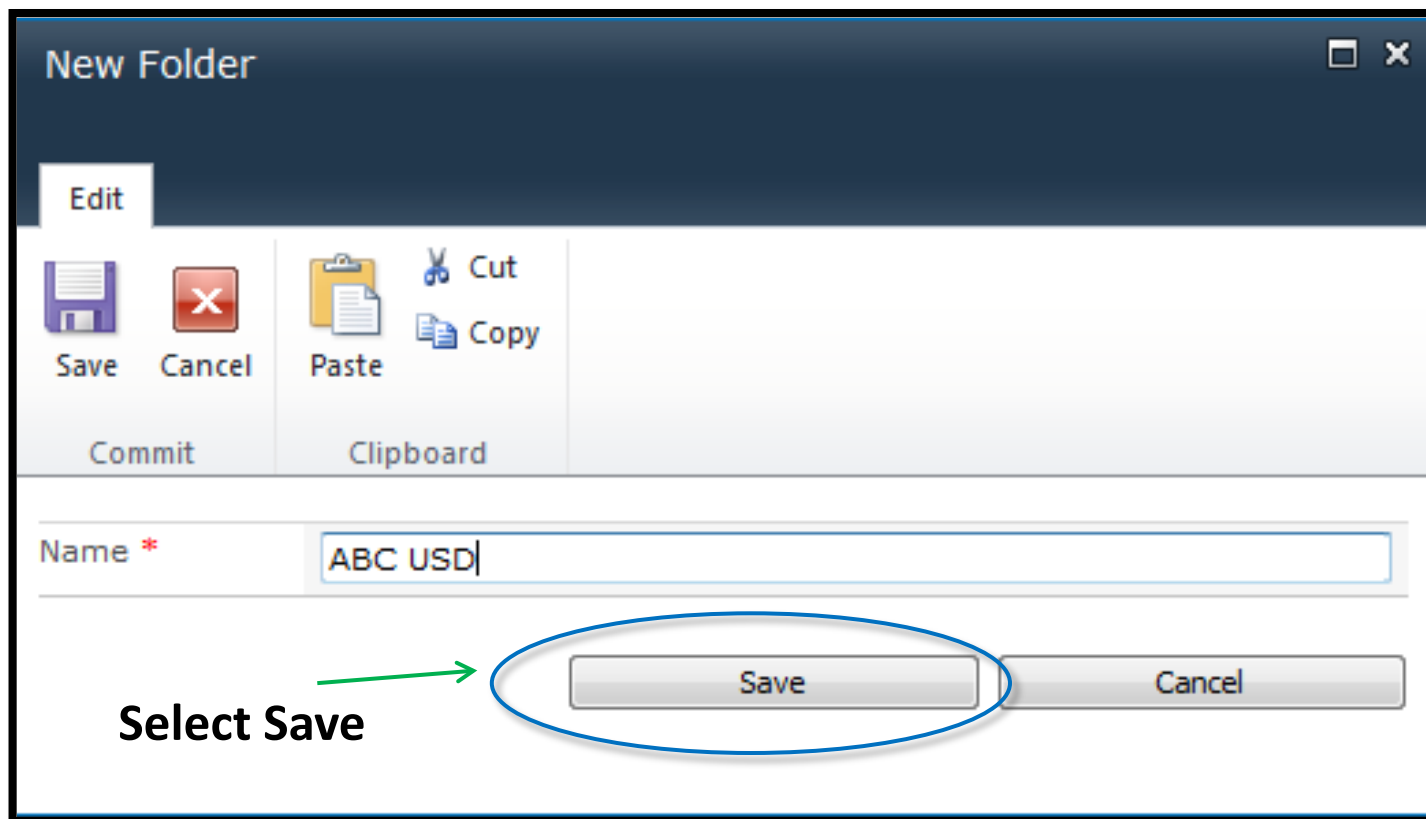


The screenshot displays the SharePoint 'Library Tools' ribbon. The 'New Folder' button is circled in blue. A green arrow points from the text '2. Select New Folder' to this button. The ribbon includes sections for 'New', 'Open & Check Out', 'Manage', 'Share & Track', 'Copies', and 'Workflows'. The 'New Folder' button is located in the 'New' section. Below the ribbon, the 'SMAA' library is selected in the left-hand navigation pane. The main content area shows a table with columns for 'Name', 'Modified', and 'Modified By'. A tooltip for the 'New Folder' button is visible, stating 'Create a new folder in this library.' and 'view of the "SMAA" document library.'

2. Select New Folder

Group Learning Exercise Continue...

- ▶ **Input claiming unit name → Select Save**
 - **Verify the folder name matches the Participant Universe Grid claiming unit name**



Group Learning Exercise Continue...

The screenshot shows a SharePoint library interface. The breadcrumb path is "Administrative Claiming Local and School Services > SMAA > ... 13_14_2 > All Documents". The left sidebar contains "Libraries" with "SMAA" selected, and "All Site Content" at the bottom. The main content area displays a table with columns: "Name", "Type", "Modified", and "Modified By". A single row is visible with "ABC USD" in the "Name" column, a folder icon in the "Type" column, "1/23/2014 11:21 AM" in the "Modified" column, and "Yanes,Francisco" in the "Modified By" column. The "ABC USD" text is circled in blue, and a green arrow points from the text "Select ABC USD folder" below to the circle.

Name	Type	Modified	Modified By
ABC USD	Folder	1/23/2014 11:21 AM	Yanes,Francisco

Select ABC USD folder

Group Learning Exercise Continue...

- ▶ This is the location where the files (grid & supporting docs) are uploaded

1. Select documents

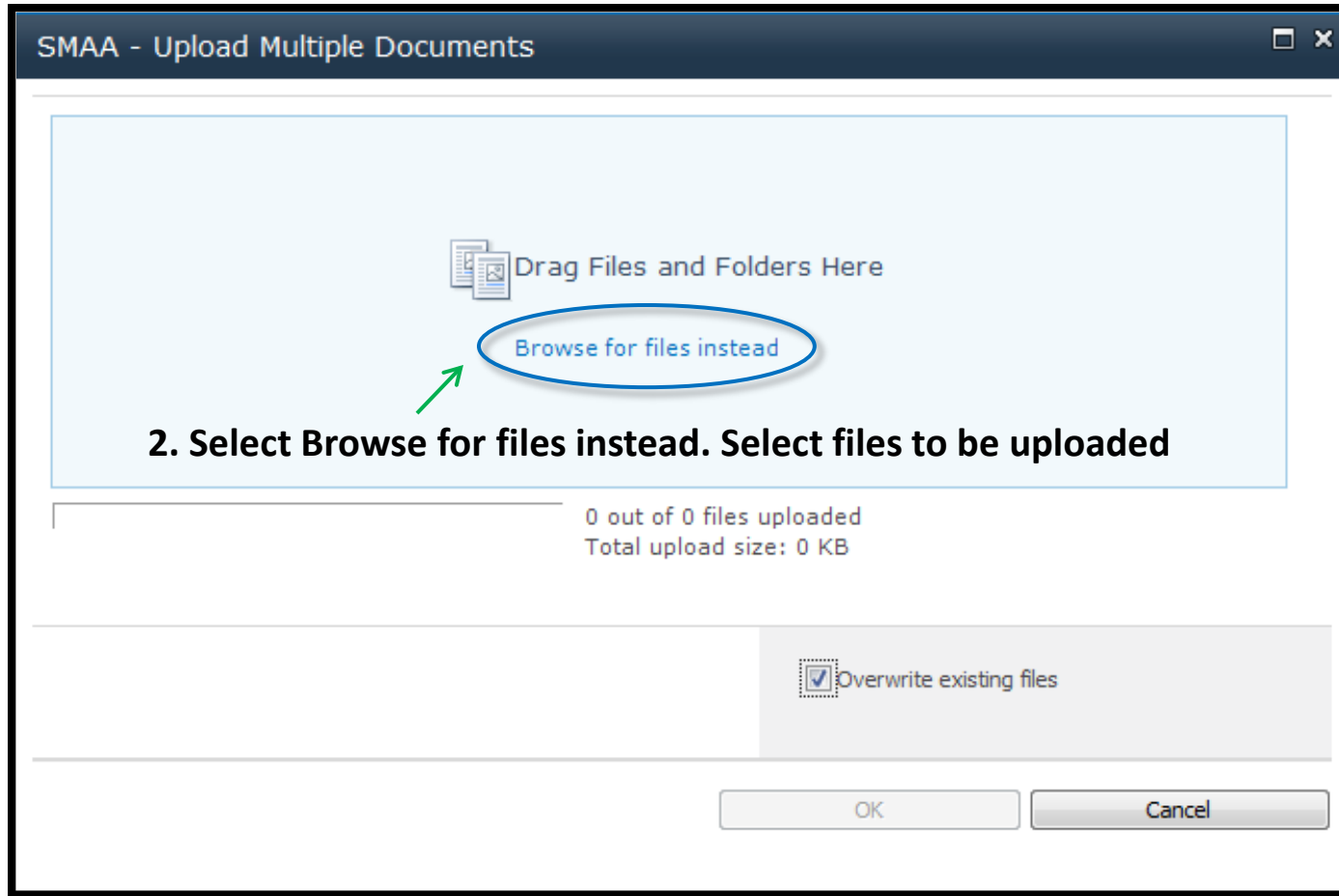
Group Learning Exercise Continue...

- ▶ This is the location where the files(grid & supporting docs) are uploaded

The screenshot shows the SharePoint interface for a document library. The ribbon is set to 'Library Tools' and the 'Library' tab is active. The 'Upload Document' option is circled in blue, and the 'Upload Multiple Documents' option is highlighted in green. A blue arrow labeled '1' points to the 'Upload Document' option, and a green arrow labeled '2' points to the 'Upload Multiple Documents' option. The interface also shows a list of documents with columns for Name, Modified, and Modified By.



1. Select Upload Document
2. Select Upload Multiple Documents

Group Learning Exercise Continue...



Group Learning Exercise Continue...

SMAA - Upload Multiple Documents


Type	Name	Size	Status
	ABC Backing.pdf	413 KB	Remove
	ABC Grid.pdf	413 KB	Remove

0 out of 2 files uploaded
Total upload size: 825 KB

Select OK then select done

Overwrite existing files

OK Cancel



Group Learning Exercise Continue...

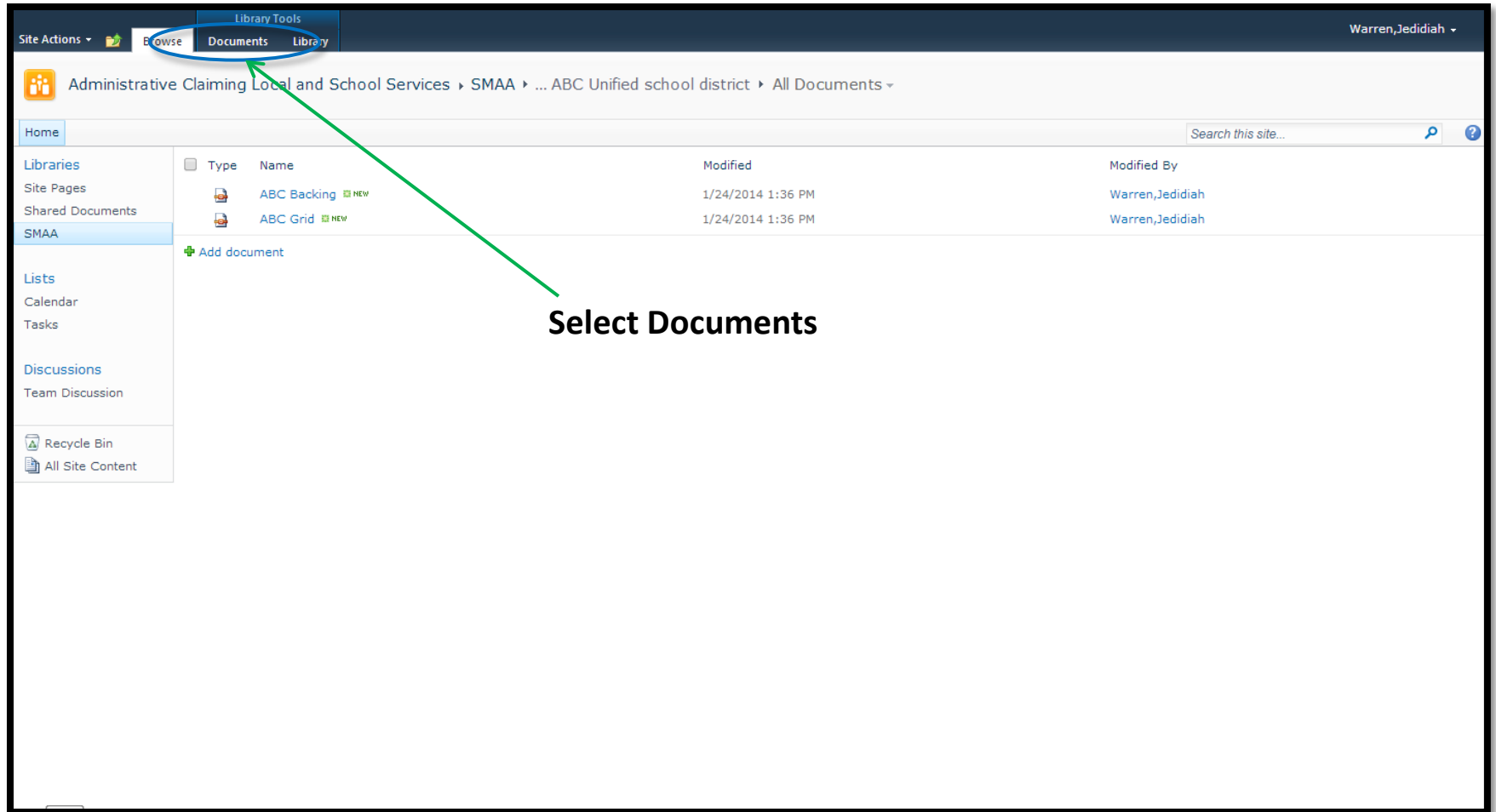
The screenshot shows a SharePoint library interface. The breadcrumb path is: Administrative Claiming Local and School Services > SMAA > ... ABC USD > All Documents. The table contains the following data:

Type	Name	Modified	Modified By
	ABC Backing NEW	1/23/2014 11:36 AM	Yanes,Francisco
	ABC Grid NEW	1/23/2014 11:36 AM	Yanes,Francisco

Below the table, the text "Documents will appear here" is displayed with a green arrow pointing to the highlighted rows in the table above.

Group Learning Exercise Continue...

- ▶ Email a link to your analyst



The screenshot displays a SharePoint library interface. At the top, the 'Library Tools' ribbon is visible, with the 'Documents' tab selected and circled in blue. A green arrow points from the text 'Select Documents' to the 'Documents' tab. The main content area shows a table of documents with columns for 'Type', 'Name', 'Modified', and 'Modified By'. Two documents are listed: 'ABC Backing' and 'ABC Grid', both marked as 'NEW' and modified on 1/24/2014 at 1:36 PM by Warren, Jediah. Below the table is an 'Add document' button. The left sidebar contains navigation options such as 'Home', 'Libraries', 'Site Pages', 'Shared Documents', 'SMAA', 'Lists', 'Calendar', 'Tasks', 'Discussions', 'Team Discussion', 'Recycle Bin', and 'All Site Content'. The top right corner shows the user name 'Warren, Jediah'.

Type	Name	Modified	Modified By
	ABC Backing NEW	1/24/2014 1:36 PM	Warren, Jediah
	ABC Grid NEW	1/24/2014 1:36 PM	Warren, Jediah

Group Learning Exercise Continue...

- ▶ Select one document then select E-mail a Link

The screenshot displays a SharePoint library interface. The top navigation bar includes 'Site Actions', 'Browse', 'Documents', and 'Library'. The 'Library Tools' ribbon is active, showing various actions like 'New Document', 'Upload Document', 'New Folder', 'Edit Document', 'Check Out', 'Check In', 'Discard Check Out', 'View Properties', 'Edit Properties', 'Delete Document', 'Version History', 'Document Permissions', 'E-mail a Link', 'Download a Copy', 'Send To', 'Manage Copies', 'Go To Source', 'Workflows', 'Publish', 'Unpublish', 'Approve/Reject', and 'Cancel Approval'. The 'E-mail a Link' option is circled in blue. The main content area shows a table of documents:

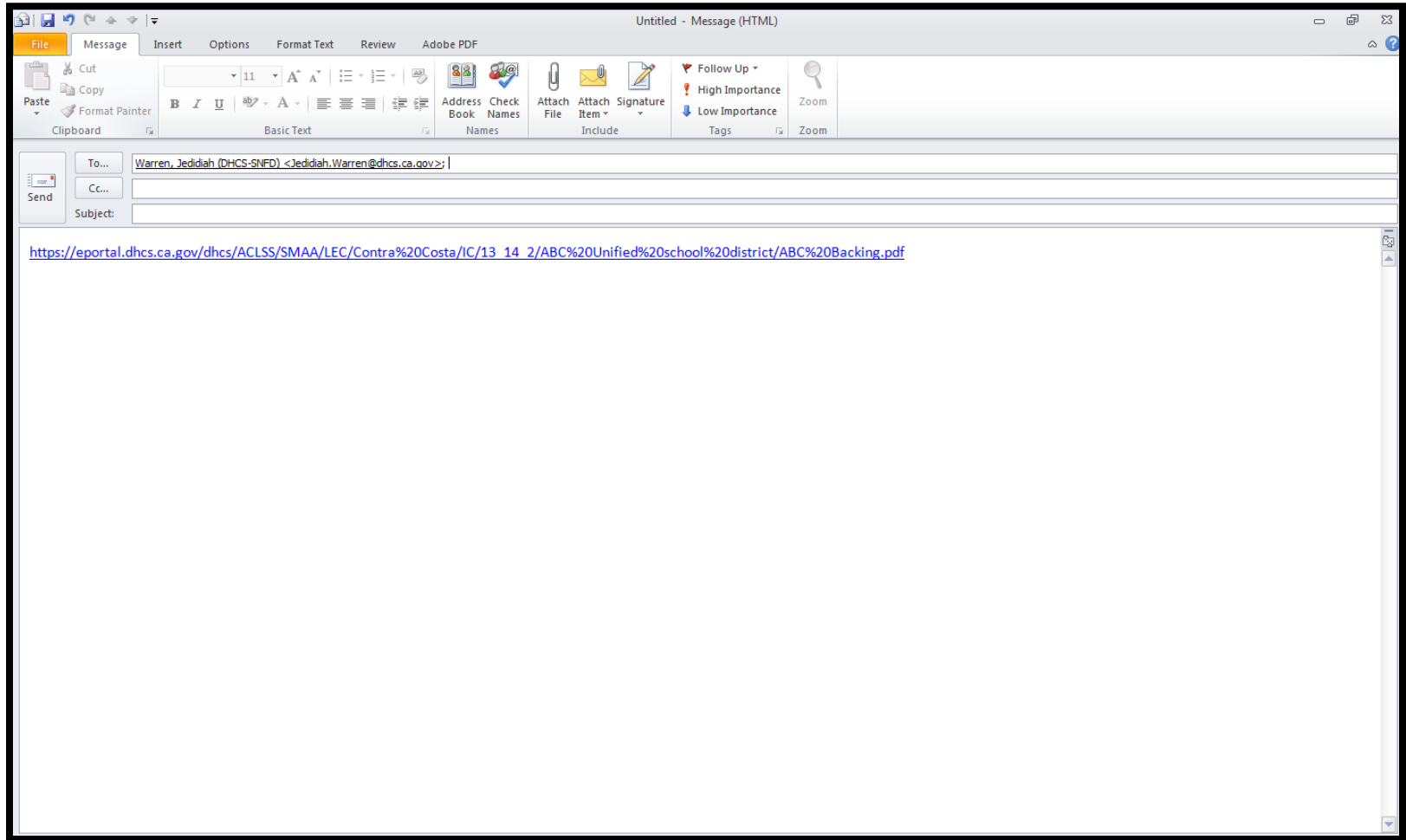
Type	Name	Modified	Modified By
<input checked="" type="checkbox"/>	ABC Backing NEW	1/24/2014 1:36 PM	Warren, Jedidiah
<input type="checkbox"/>	ABC Grid NEW	1/24/2014 1:36 PM	Warren, Jedidiah

Two green arrows point to the 'ABC Backing' document and the 'E-mail a Link' button. Below the screenshot, the following instructions are provided:

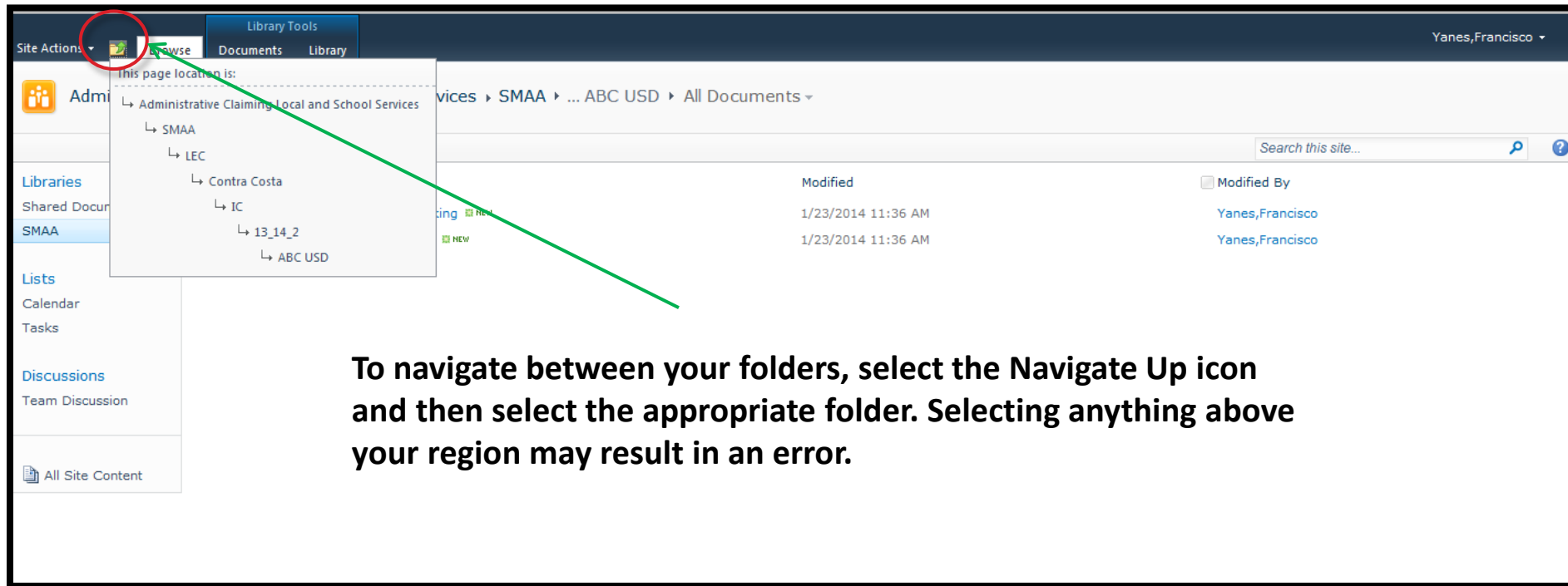
1. Select Document
2. Select E-mail a Link

Group Learning Exercise Continue...

- ▶ E-mail link to your analyst



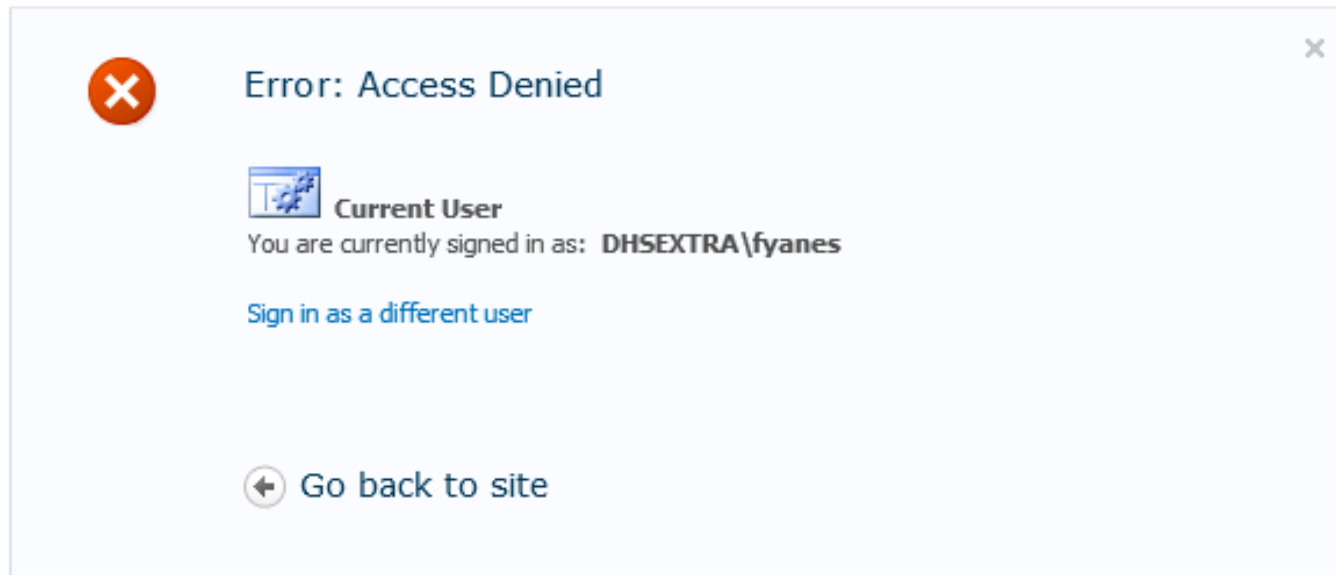
Group Learning Exercise Continue...



To navigate between your folders, select the Navigate Up icon and then select the appropriate folder. Selecting anything above your region may result in an error.

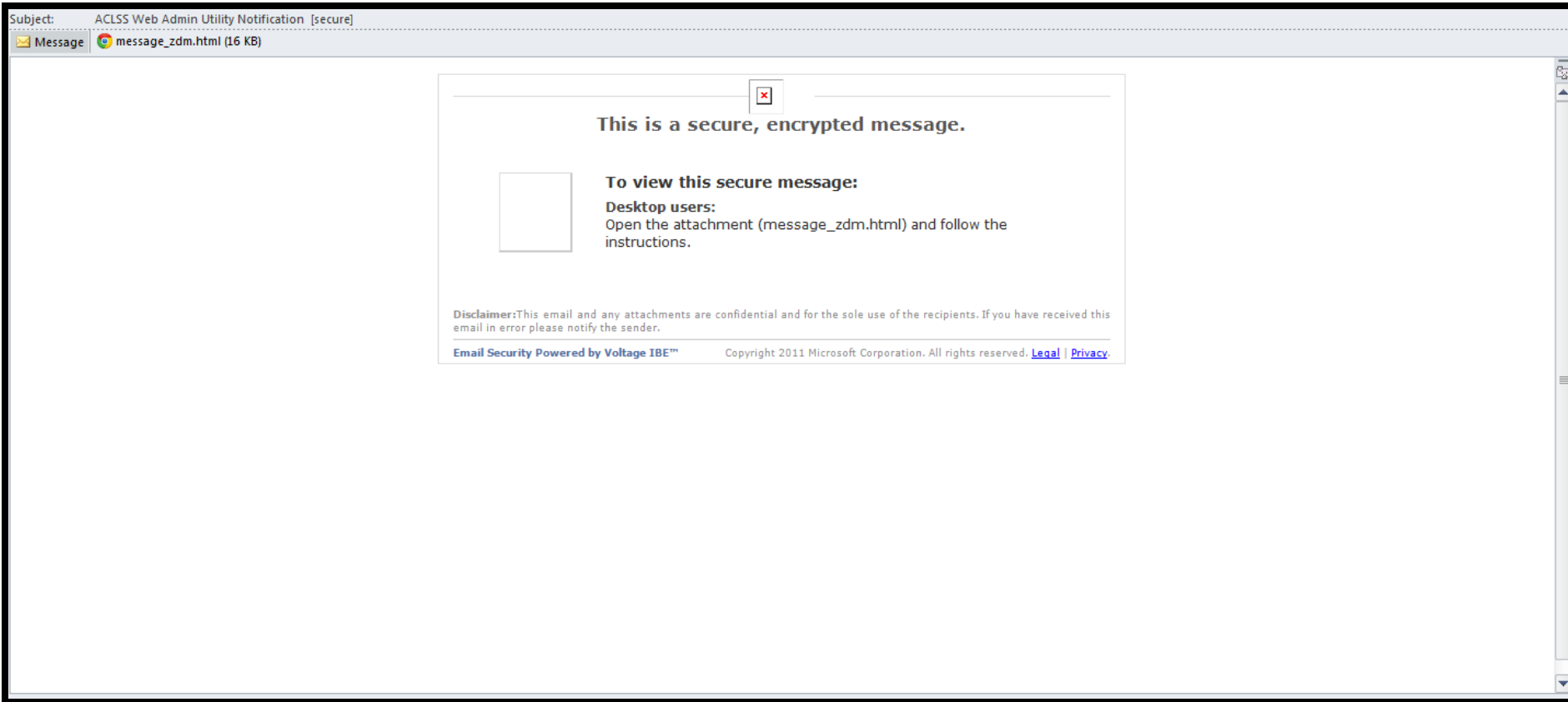
Group Learning Exercise Continue...

You may accidentally select a folder you do not have permission to access. Select your back key or close browser and reopen your unique URL address



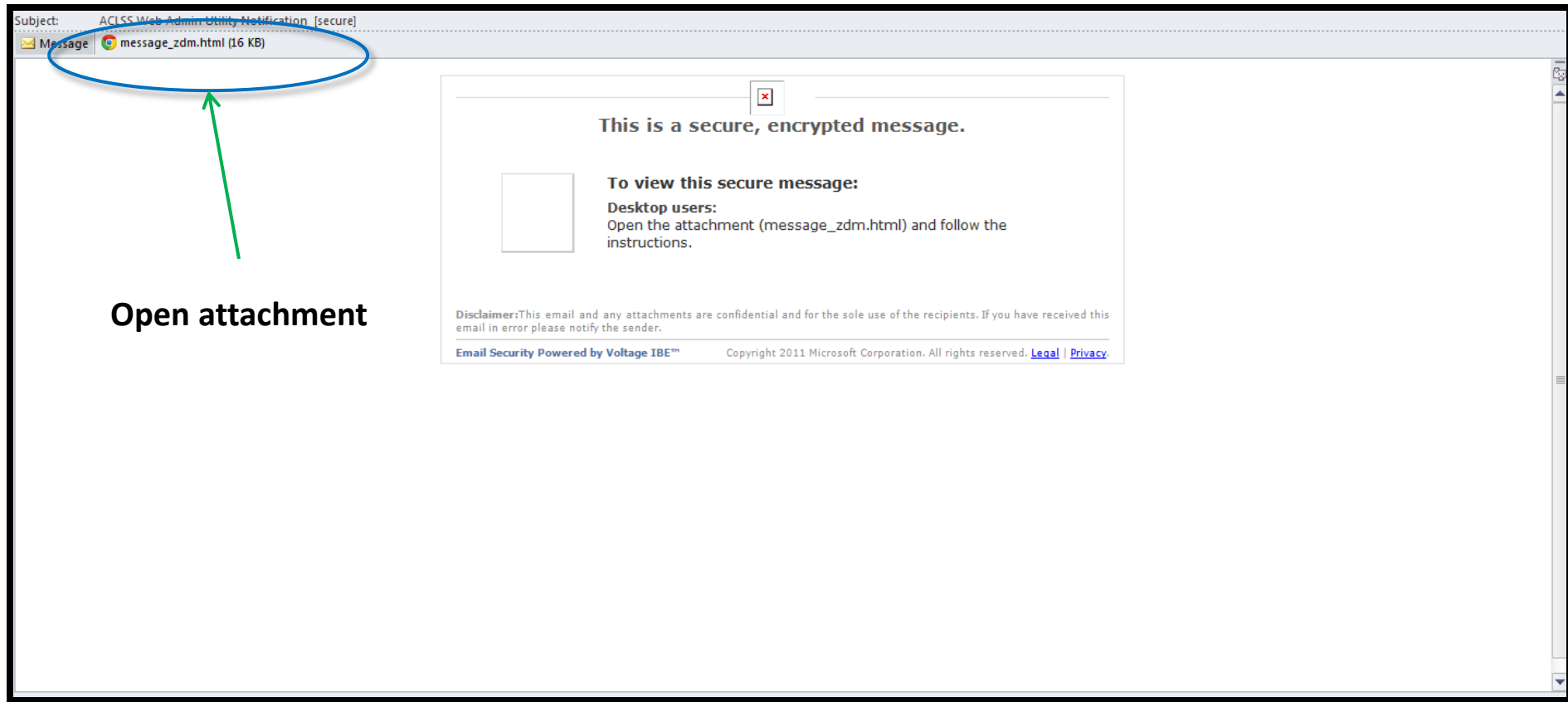
SharePoint Registration

- ▶ You will receive an email with instructions to register for SharePoint



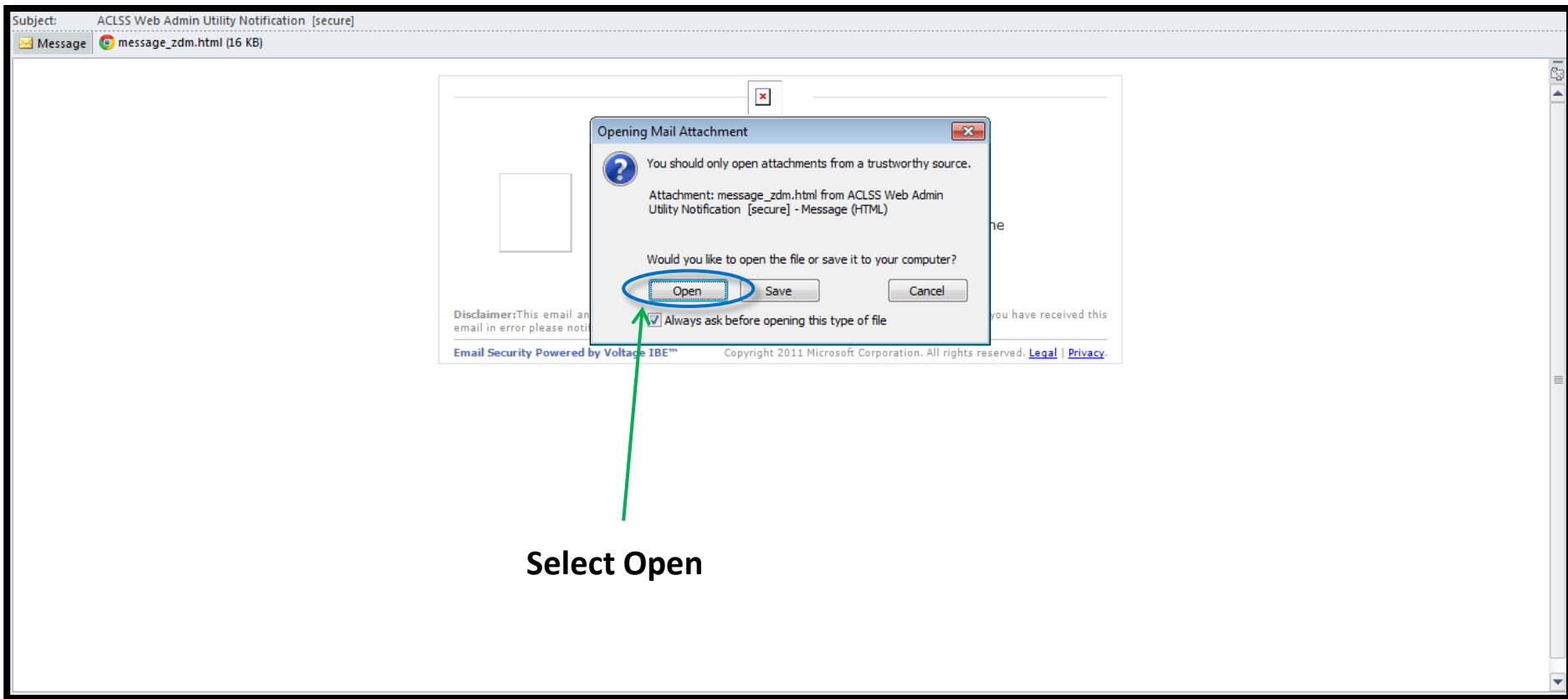
SharePoint Registration Continue...

- ▶ Step 1: Double click the attachment



Open attachment

SharePoint Registration Continue...



The screenshot shows an email client window with the subject "ACLSS Web Admin Utility Notification [secure]" and an attachment named "message_zdm.html (16 KB)". A security warning dialog box titled "Opening Mail Attachment" is displayed in the foreground. The dialog contains the following text:

You should only open attachments from a trustworthy source.

Attachment: message_zdm.html from ACLSS Web Admin Utility Notification [secure] - Message (HTML)

Would you like to open the file or save it to your computer?

Open Save Cancel

Always ask before opening this type of file

The "Open" button is circled in blue, and a green arrow points to it from the text "Select Open" below the dialog. The background of the email client shows a disclaimer and footer information: "Disclaimer: This email and any attachments are confidential... Email Security Powered by Voltage IBE™ Copyright 2011 Microsoft Corporation. All rights reserved. [Legal](#) | [Privacy](#)."

Select Open

SharePoint Registration Continue...

Microsoft®
Exchange
Hosted Encryption

Click Read Message to open this secure email
(New users may need to verify their email address)

Read Message

Select Read Message

Disclaimer: This email and any attachments are confidential and for the sole use of the recipients. If you have received this email in error please notify the sender.

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SharePoint Registration Continue...

Microsoft
Exchange
Hosted Encryption

[Help](#)

Create a password to continue:

Full Name:

Email Address: mmt_jwarren182764912372013@mgd.ces.ca.gov

Choose a Password:

Retype Password:

You will be asked for this password periodically for security purposes.

We value your right to privacy. We will not share your information or sell it to a third party.

Exchange Hosted Encryption
[Learn More](#)

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SharePoint Registration Continue...

- ▶ Fill in appropriate Fields
- ▶ Please note your information for future references

Microsoft
Exchange
Hosted Encryption

Help

Create a password to continue:

Full Name: Jedidiah Warren

Email Address: mmt_jwarren182764912372013@mgd.ces.ca.gov

Choose a Password:

Retype Password:

Continue

You will be asked for this password periodically for security purposes.
We value your right to privacy. We will not share your information or sell it to a third party.

Exchange Hosted Encryption
[Learn More](#)

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SharePoint Registration Continue...

Microsoft
Exchange
Hosted Encryption

[Help](#)

Check Your Email

We have sent a message to your email account with the subject:

Exchange Hosted Encryption Identity Verification - Do Not Reply

When you receive the message, click on the link to verify your email address.

The link will expire for security purposes.

Note: If you do not receive this message in your inbox within the next few minutes, check your bulk/junk email folder.

You may now close this window.

*The message will come from Microsoft Hosted Encryption
<hostedencryption@encryption.messaging.microsoft.com>.*

Exchange Hosted Encryption

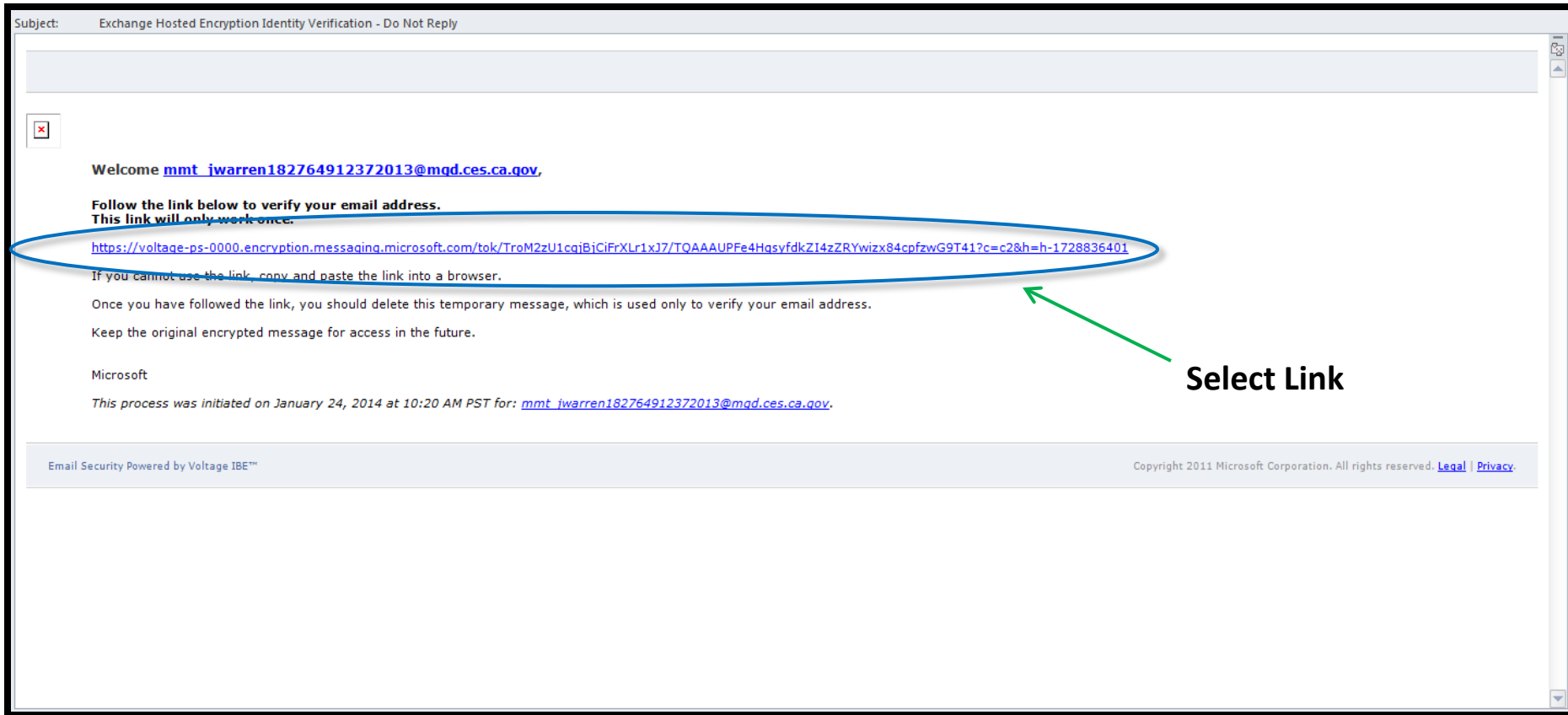
[Learn More](#)

Email Security Powered by Voltage IBE™

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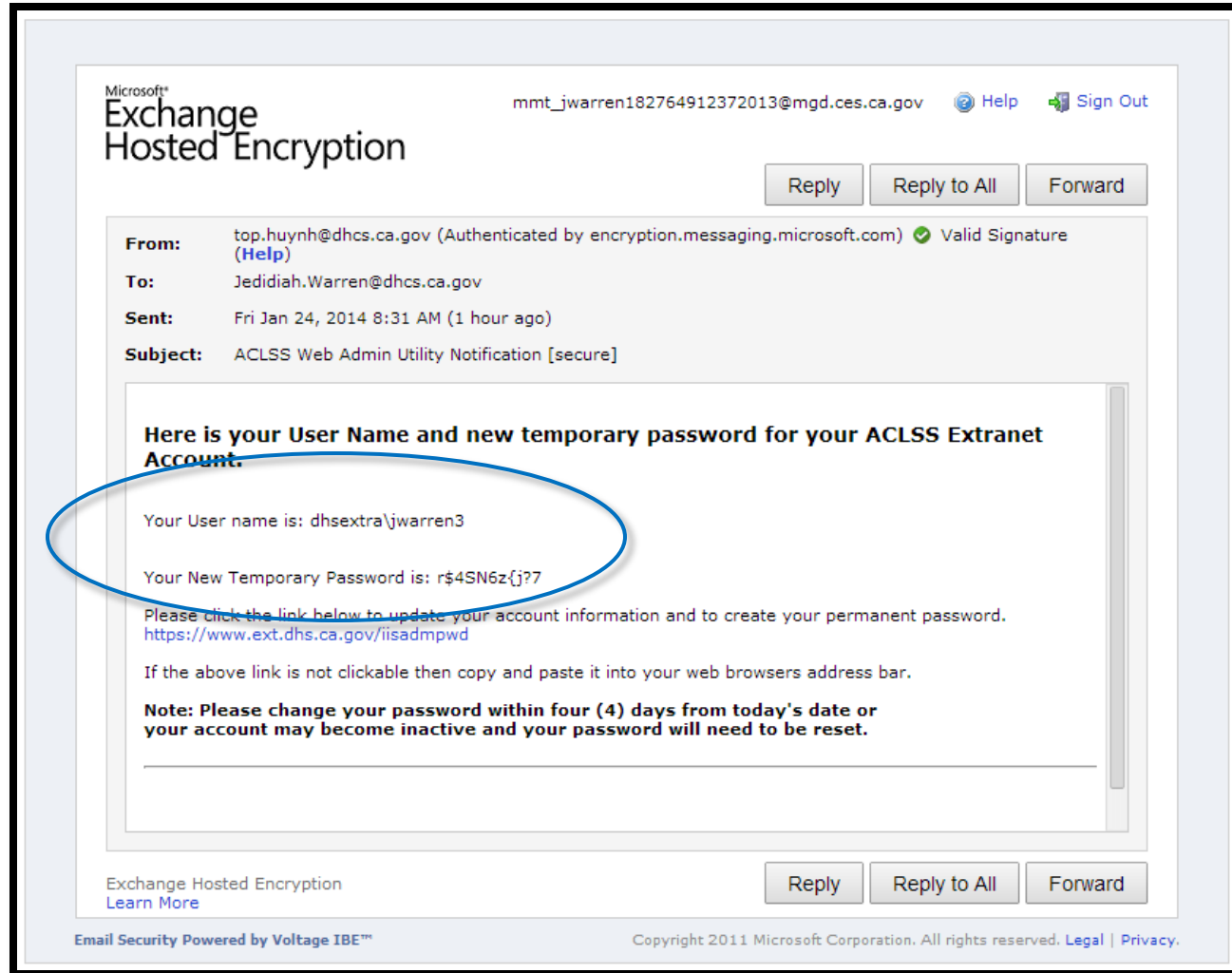
SharePoint Registration Continue...

- ▶ This is the email you will receive



SharePoint Registration Continue...

- ▶ Please write down your username and temporary password



Microsoft Exchange Hosted Encryption

mmt_jwarren182764912372013@mgd.ces.ca.gov Help Sign Out

Reply Reply to All Forward

From: top.huynh@dhcs.ca.gov (Authenticated by encryption.messaging.microsoft.com) Valid Signature (Help)
To: Jedidiah.Warren@dhcs.ca.gov
Sent: Fri Jan 24, 2014 8:31 AM (1 hour ago)
Subject: ACLSS Web Admin Utility Notification [secure]

Here is your User Name and new temporary password for your ACLSS Extranet Account.

Your User name is: dhsextra\jwarren3

Your New Temporary Password is: r\$4SN6z{j?7

Please click the link below to update your account information and to create your permanent password.
<https://www.ext.dhs.ca.gov/iisadmpwd>

If the above link is not clickable then copy and paste it into your web browsers address bar.

Note: Please change your password within four (4) days from today's date or your account may become inactive and your password will need to be reset.

Exchange Hosted Encryption Learn More

Reply Reply to All Forward

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SharePoint Registration Continue...

Microsoft Exchange Hosted Encryption

mmt_jwarren182764912372013@mgd.ces.ca.gov Help Sign Out

Reply Reply to All Forward

From: top.huynh@dhcs.ca.gov (Authenticated by encryption.messaging.microsoft.com) Valid Signature (Help)
To: Jedidiah.Warren@dhcs.ca.gov
Sent: Fri Jan 24, 2014 8:31 AM (1 hour ago)
Subject: ACLSS Web Admin Utility Notification [secure]

Here is your User Name and new temporary password for your ACLSS Extranet Account.

Your User name is: dhsextra\jwarren3

Your New Temporary Password is: r\$4SN6z{j?7

Please click the link below to update your account information and to create your permanent password.
<https://www.ext.dhs.ca.gov/iisadmpwd>

If the above link is not clickable then copy and paste it into your web browsers address bar.

Note: Please change your password within four (4) days from today's date or your account may become inactive and your password will need to be reset.

Select Link

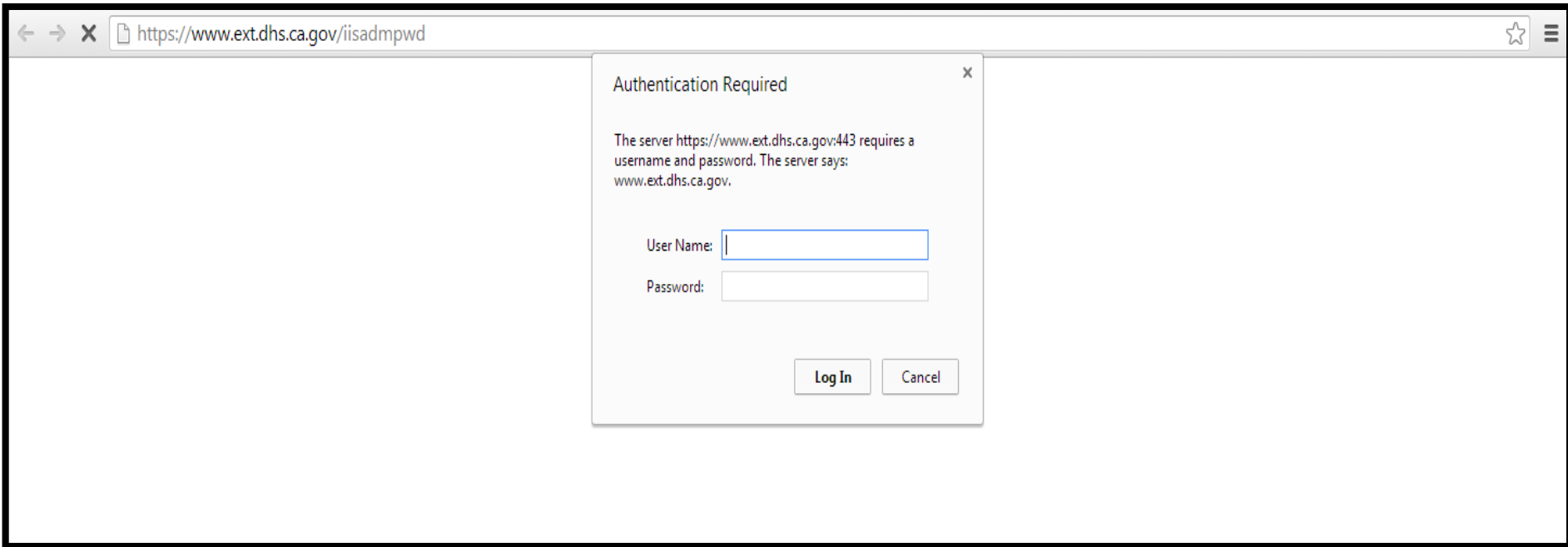
Exchange Hosted Encryption Learn More

Reply Reply to All Forward

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SharePoint Registration Continue...

- ▶ Input username and temporary password
- ▶ Select Log In



SharePoint Registration Continue...

- ▶ Fill out the appropriate fields

DHCS Internet Service Manager

Passwords must be 9 characters or more and contain at least:

- 1 UPPERCASE
- 1 lowercase
- 1 numeric character

NOTE: Do not use a space or a number as the first character of your password.

Your password has expired. You can change it now.

User name

Old/Temporary password

New password

Confirm new password

SharePoint Registration Continue...

▶ Password Requirements

DHCS Internet Service Manager

Passwords must be 9 characters or more and contain at least:

- 1 UPPERCASE
- 1 lowercase
- 1 numeric character

NOTE: Do not use a space or a number as the first character of your password.

Error: Invalid username or password

[Back](#)

SharePoint Registration Continue...

DHCS Internet Service Manager

Passwords must be 9 characters or more and contain at least:

- 1 UPPERCASE
- 1 lowercase
- 1 numeric character

NOTE: Do not use a space or a number as the first character of your password.

Your password has expired. You can change it now.

User name	<input type="text" value="dhsextra\jwarren3"/>
Old/Temporary password	<input type="password" value="....."/>
New password	<input type="password" value="....."/>
Confirm new password	<input type="password" value="....."/>

Select Submit

SharePoint Registration Continue...

DHCS Internet Service Manager

Passwords must be 9 characters or more and contain at least:

- 1 UPPERCASE
- 1 lowercase
- 1 numeric character

NOTE: Do not use a space or a number as the first character of your password.

Password Successfully Changed

You may now close this window or browse to another web page

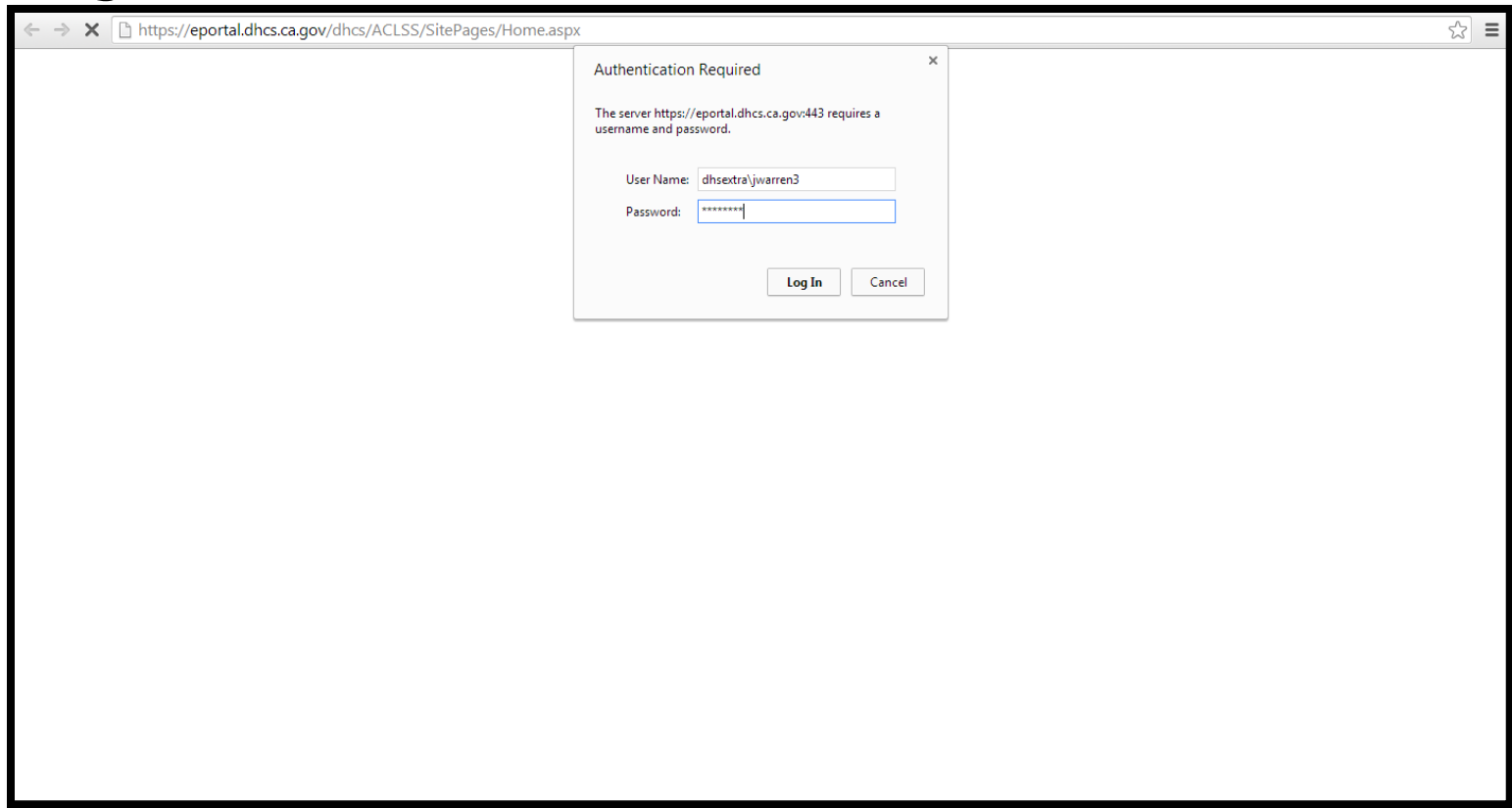
SharePoint Registration Continue...

- ▶ You are now ready to log in to SharePoint
- ▶ You will receive a personal link to your region
- ▶ You will have access to your region only

SharePoint Registration Continue...

▶ Example Contra Costa

- Select personal Link:
<https://eportal.dhcs.ca.gov/contracosta>
- Log in with credentials



Questions?