

Quick Links: [Overview](#) | [View Workbooks](#) | [Upload a File](#) | [New File Version](#) | [Version History](#) | [Error Messages](#) | [Questions](#)

Overview

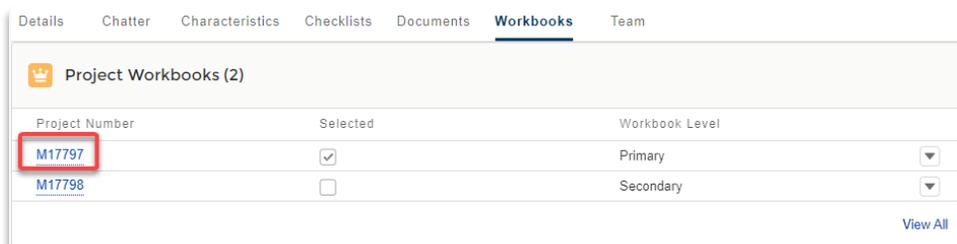
The Multifamily Workbook is the primary tool used to collect and analyze project specific data for applicants applying for funds from Minnesota Housing. The **Workbooks** section of a project page allows Minnesota Housing to store:

- Memorialized versions of project workbooks at specific milestones in the process. For example, Minnesota Housing will store the board selection workbook after projects are selected for funding by our board.
- Minnesota Housing’s working version.
- Customer’s working version. This is where you can upload your latest draft of the workbook.

NOTE: In some funding rounds such as the Consolidated Request for Proposals, the ‘Workbooks’ section becomes visible after the project is selected for funding by Minnesota Housing’s board. This guide assumes you can see the ‘Workbooks’ section of a project page. Customers should always upload the Multifamily workbook to a checklist when it appears as a required checklist item, even if this section of a project page is visible.

View Workbooks

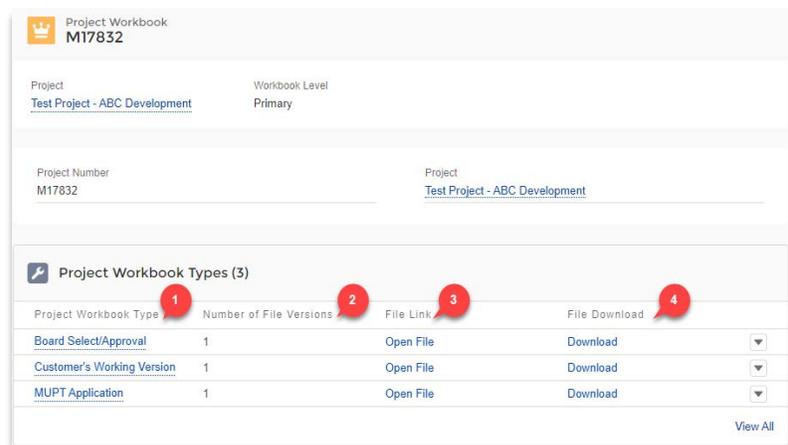
Click on the **Workbooks tab** on a project page and select the appropriate project number. If multiple project numbers appear, click into the record with the ‘Selected’ flag enabled.



Project Number	Selected	Workbook Level
M17797	<input checked="" type="checkbox"/>	Primary
M17798	<input type="checkbox"/>	Secondary

On the new screen you can:

1. View the list of available workbook types
2. View the number of file versions
3. Click **Open File** to see the workbook versions and version notes
4. Click **Download** to download the most current version of the workbook.

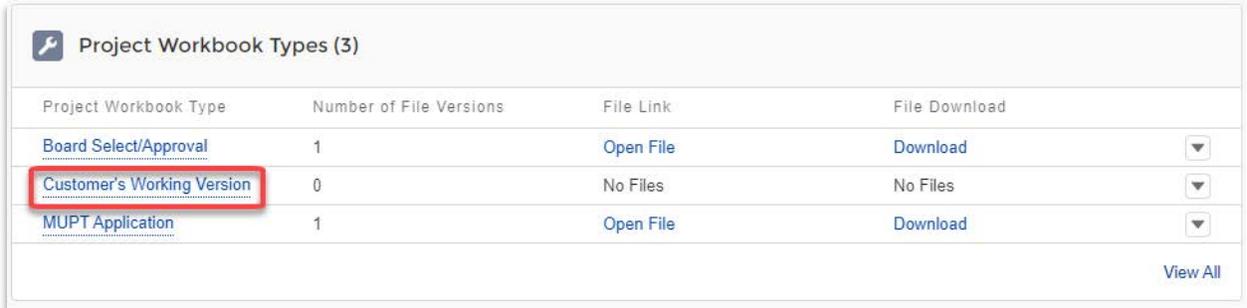


Project Workbook Type	Number of File Versions	File Link	File Download
Board Select/Approval	1	Open File	Download
Customer's Working Version	1	Open File	Download
MUPT Application	1	Open File	Download

Upload a File

To upload a file:

- Click on the **name of the workbook type** from the list.

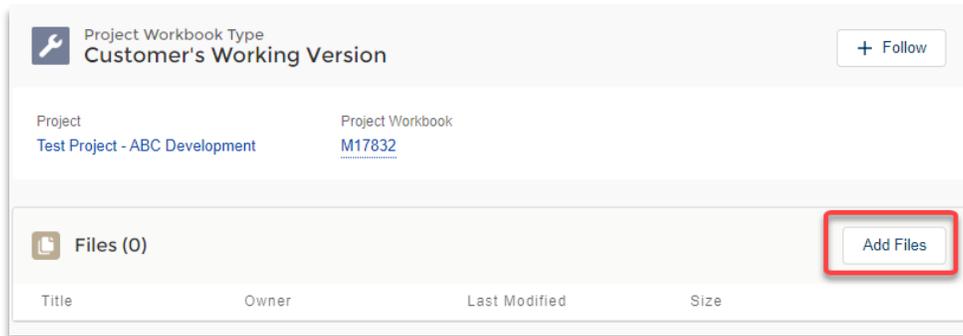


A screenshot of a web interface showing a list of Project Workbook Types. The list has four columns: Project Workbook Type, Number of File Versions, File Link, and File Download. The 'Customer's Working Version' row is highlighted with a red box.

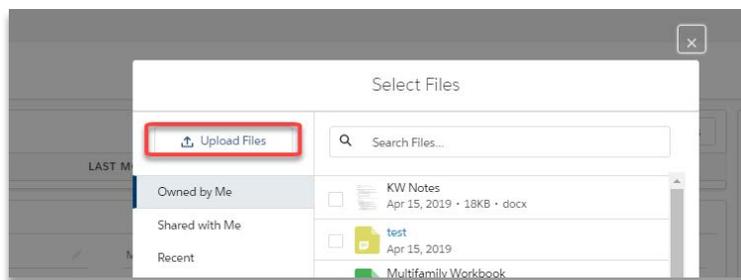
Project Workbook Type	Number of File Versions	File Link	File Download
Board Select/Approval	1	Open File	Download
Customer's Working Version	0	No Files	No Files
MUPT Application	1	Open File	Download

View All

- Within the Files section, click **Add Files**.



- Click the **Upload Files** button to select the file.



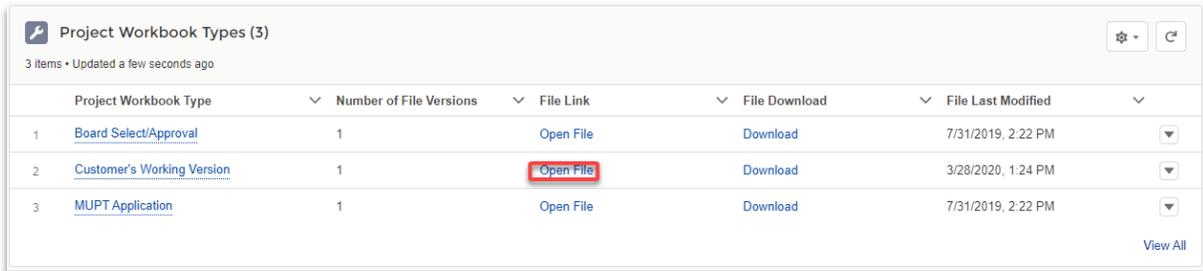
- Locate the file on your computer and select **Open**. Once the file has uploaded, select **Done**.

NOTE: You can only upload one file per workbook type in the Portal. This is to allow for data to be extracted for reporting purposes. You will see an error message if you exceed the limit.

Upload a New File Version

You can only upload one file per workbook type in the Portal. This is to allow for data to be extracted for reporting purposes. You will see an error message if you exceed the limit.

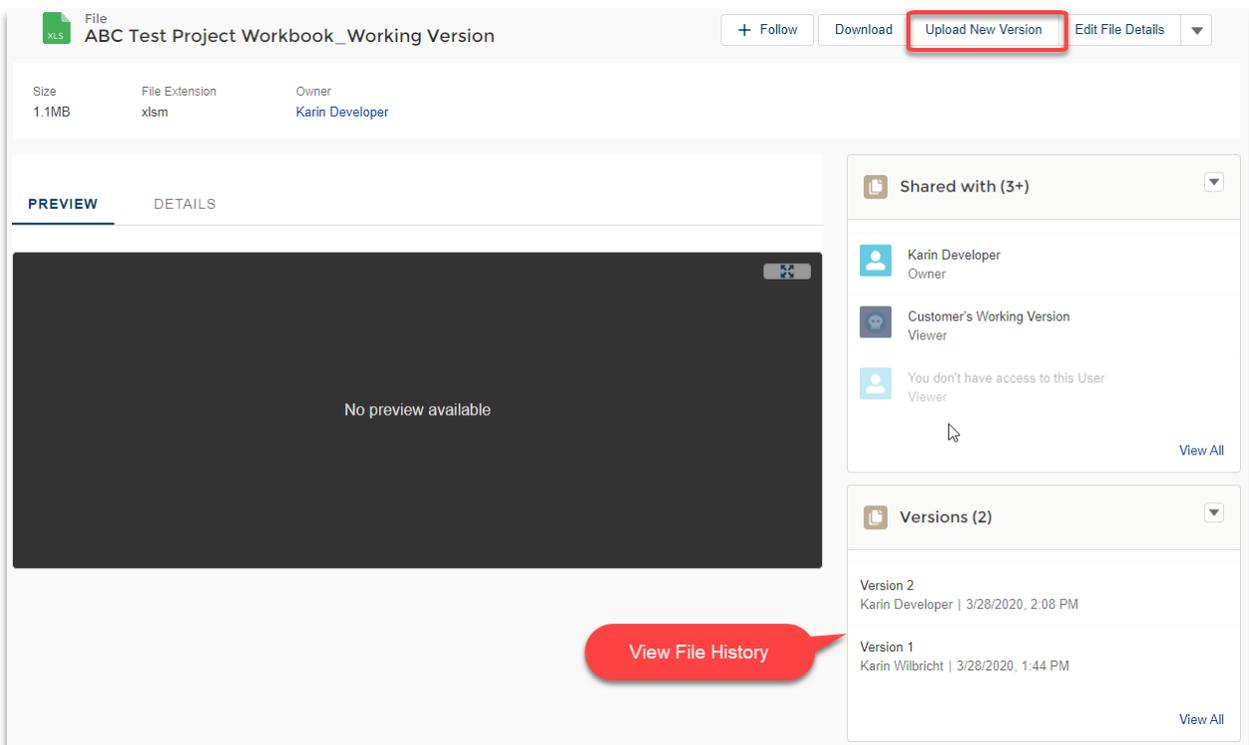
To replace an existing workbook (e.g. upload a new file version), click the 'Open File' link for the workbook type you need to update. This takes you to the File Details screen.



A screenshot of a table titled "Project Workbook Types (3)". The table has five columns: "Project Workbook Type", "Number of File Versions", "File Link", "File Download", and "File Last Modified". There are three rows of data. The second row, "Customer's Working Version", has its "Open File" link highlighted with a red box. A "View All" link is at the bottom right.

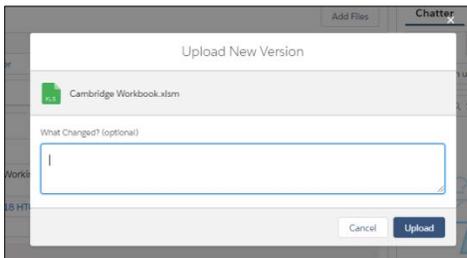
Project Workbook Type	Number of File Versions	File Link	File Download	File Last Modified
1 Board Select/Approval	1	Open File	Download	7/31/2019, 2:22 PM
2 Customer's Working Version	1	Open File	Download	3/28/2020, 1:24 PM
3 MUPT Application	1	Open File	Download	7/31/2019, 2:22 PM

Click 'Upload New Version' NOTE: you can only upload a new version if you are the owner of the file.



A screenshot of the "File Details" screen for "ABC Test Project Workbook_Working Version". The "Upload New Version" button is highlighted with a red box. A red callout bubble labeled "View File History" points to the "Versions (2)" section. The "Shared with (3+)" section lists "Karin Developer" as the Owner and "Customer's Working Version" as a Viewer. The "Versions (2)" section lists "Version 2" (Karin Developer | 3/28/2020, 2:08 PM) and "Version 1" (Karin Wilbricht | 3/28/2020, 1:44 PM). The main preview area shows "No preview available".

Locate the file you want to upload and click open. Make a note about what changed since the previous version and click 'Upload.'

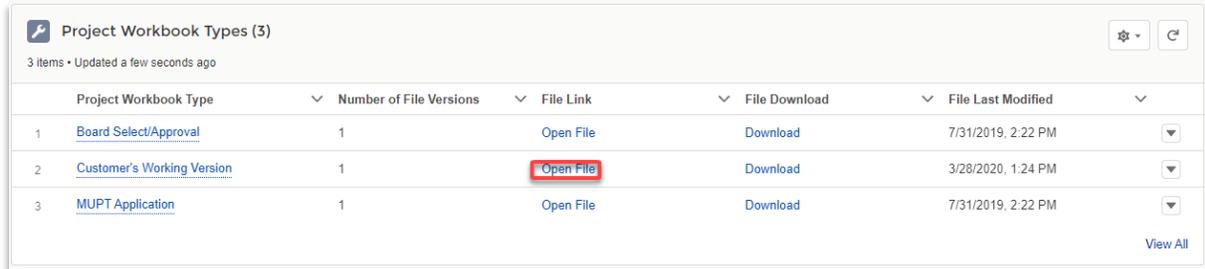


A screenshot of the "Upload New Version" dialog box. It shows the file name "Cambridge Workbook.xlsx" and a text input field labeled "What Changed? (optional)". There are "Cancel" and "Upload" buttons at the bottom.

Use the back button to navigate back to the project.

View Version History

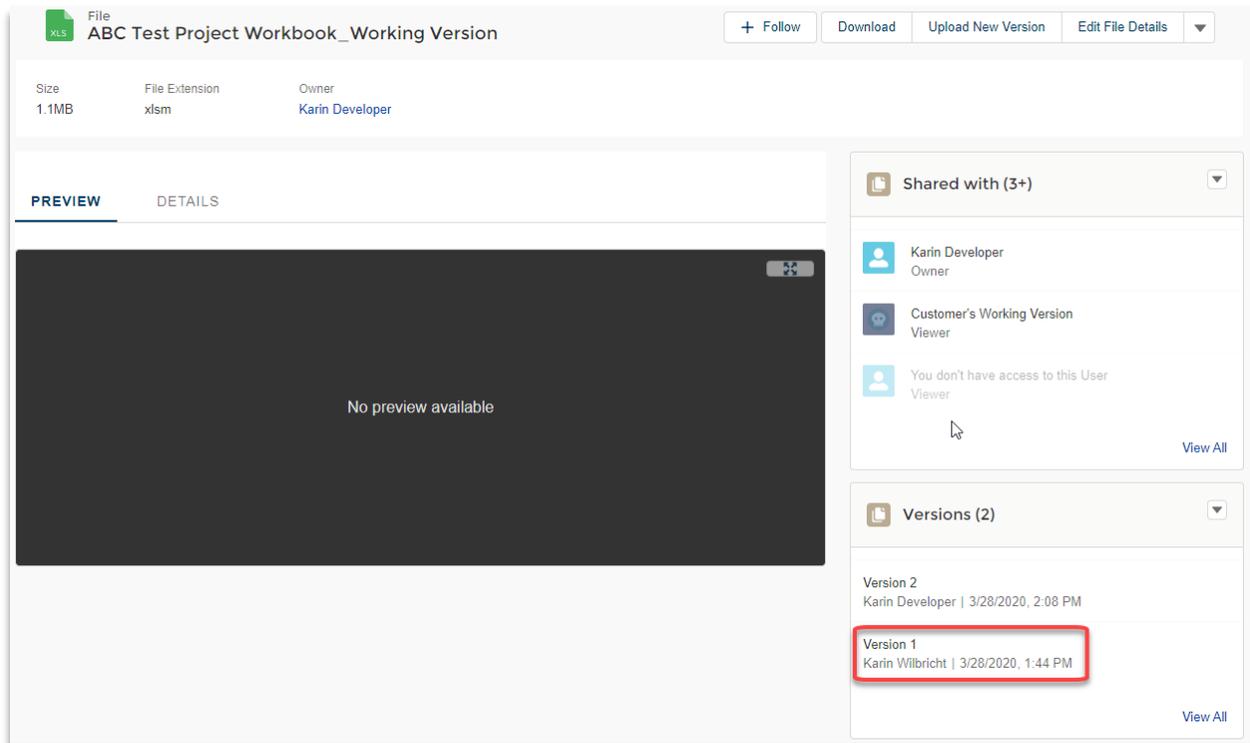
To view older versions of a workbook file, click the 'Open File' link for the workbook type you need to update. This takes you to the File Details screen.



A screenshot of a web interface showing a list of 'Project Workbook Types'. The list has three columns: 'Project Workbook Type', 'Number of File Versions', and 'File Link'. The 'Open File' link for the second item, 'Customer's Working Version', is highlighted with a red box.

Project Workbook Type	Number of File Versions	File Link	File Download	File Last Modified
1 Board Select/Approval	1	Open File	Download	7/31/2019, 2:22 PM
2 Customer's Working Version	1	Open File	Download	3/28/2020, 1:24 PM
3 MUPT Application	1	Open File	Download	7/31/2019, 2:22 PM

A new window will open in the browser. From this new window, users can download, preview, upload and view file version history. You can also edit the name of the file by clicking 'Edit Details.' **NOTE:** Not all file types can be previewed.



A screenshot of a 'File Details' screen for a file named 'ABC Test Project Workbook_Working Version'. The file is 1.1MB, has an .xlsm extension, and is owned by 'Karin Developer'. The 'PREVIEW' tab is active, but the preview area is dark with the text 'No preview available'. On the right, there are sections for 'Shared with (3+)' and 'Versions (2)'. The 'Versions' section lists two versions: 'Version 2' by Karin Developer (3/28/2020, 2:08 PM) and 'Version 1' by Karin Wilbricht (3/28/2020, 1:44 PM). The 'Version 1' entry is highlighted with a red box.

Click on the version number to download an older version of the file. Expand the list by clicking, 'View All.'

Workbook Error Messages

The system will check for file errors approximately every 15 minutes and will send an email notifying you if it locates an error in an uploaded file. For instance, a workbook item requires an M# and a D#, and if

these items are not added, the system will generate an error message indicating you must resolve this in order for the workbook data to be processed in HDS correctly.

Error Messages for Workbooks

Error Description	Error Message	Details/Instructions
Invalid Workbook Version	“Invalid Workbook Version. Please download the correct version from the Quick Link on this Checklist Item, enter your project data, and then re-upload your workbook.”	<p>The Portal restricts what versions of the workbook will be accepted; the version you uploaded is not valid.</p> <p>Please click the Quick Link to download the most current version of the workbook. Re-enter your data and replace the existing ‘File with Errors’ by re-uploading the corrected workbook.</p> <p>You can also see the required workbook version for the funding round by clicking on the name of the round from the ‘Funding Round’ tab.</p>
Invalid/Missing D# (Development Number)	“The D# in your workbook does not match the D# on the Project in the Portal. Please correct and re-upload your workbook.”	<p>The project has been assigned a D#, which can be found in the Project Detail section of the project. This number must be entered on your workbook, prior to uploading.</p> <p>Please enter this D# on the Project Description tab of your workbook, and replace the existing ‘File with Errors’ by re-uploading the corrected file.</p>
Invalid/Missing M# (Project Number)	“The M# in your workbook does not match the M# on the Project in the Portal. Please correct and re-upload your workbook.”	<p>The project has been automatically assigned two project numbers (M#), which can be found in the Project Detail section of the project. These numbers must be entered on your corrected workbook prior to uploading.</p> <ul style="list-style-type: none"> • Multifamily Workbook = primary project # • Dual Multifamily Workbook = secondary project # <p>Please enter this M# on the Project Description tab of your workbook, and replace the existing ‘File with Errors’ by re-uploading the corrected file.</p>

Questions

Contact mhfa.app@state.mn.us.