Multifamily Customer Portal
Project Workbooks

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Overview

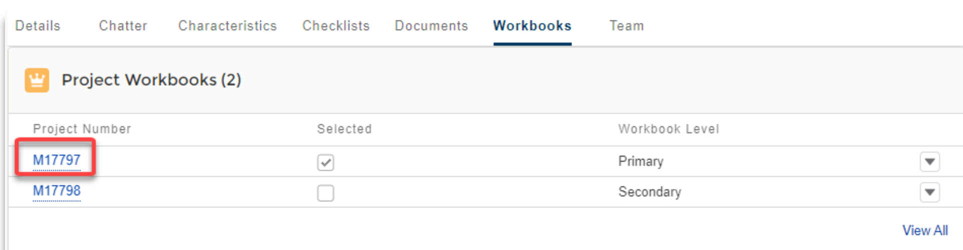
The Multifamily Workbook is the primary tool used to collect and analyze project specific data for applicants applying for funds from Minnesota Housing. The **Workbooks** section of a project page allows Minnesota Housing to store:

- 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.

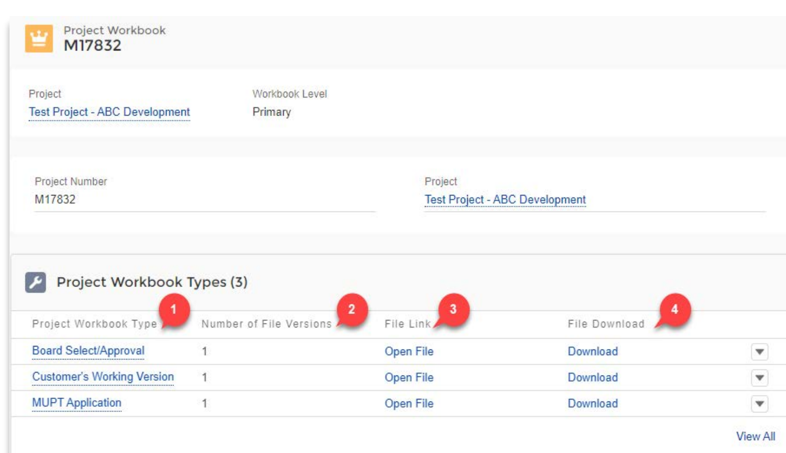
View Workbooks

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.



On the new screen you can:

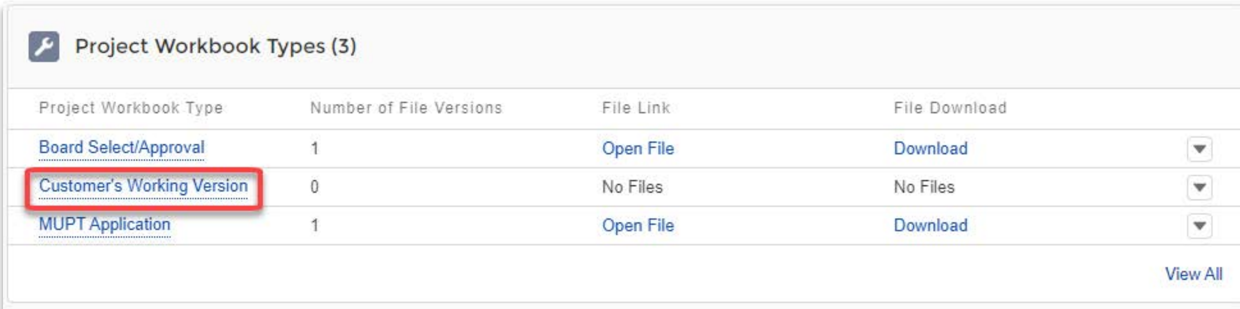
1. View the list of available workbook types
2. View the number of file versions
3. Click **Open File** to see the workbook versions and version notes
4. Click **Download** to download the most current version of the workbook.



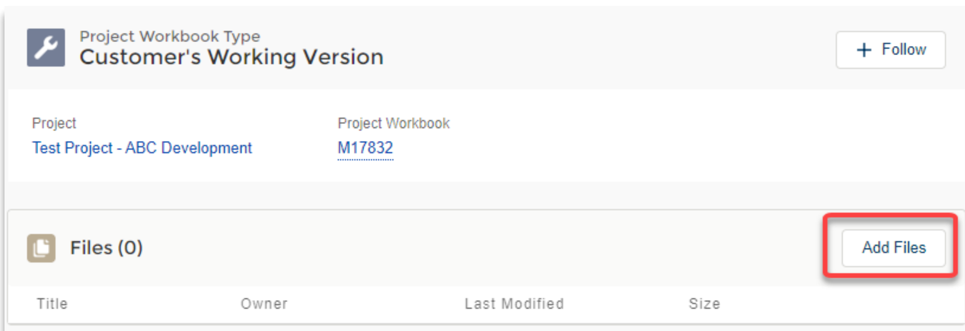
Upload a File

To upload a file:

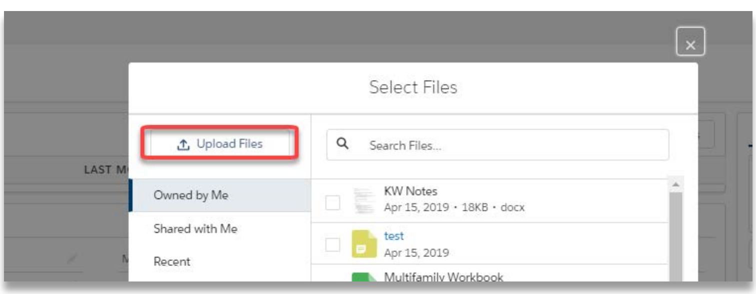
- Click on the **name of the workbook type** from the list.



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



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



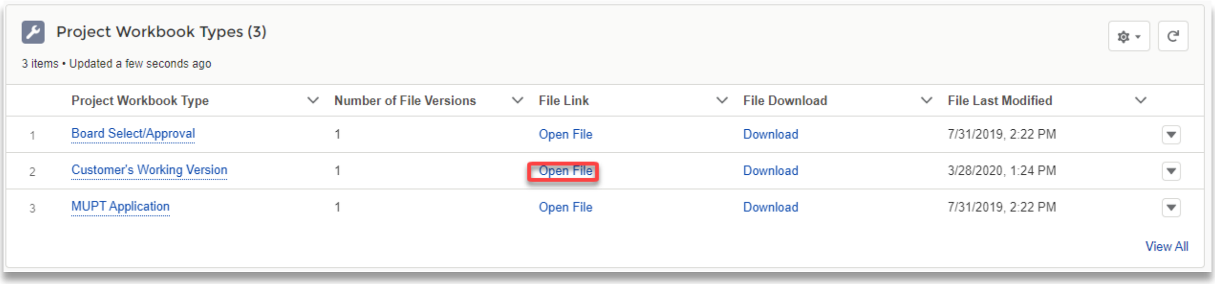
- Locate the file on your computer and select **Open.** Once the file has uploaded, select **Done.**

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.

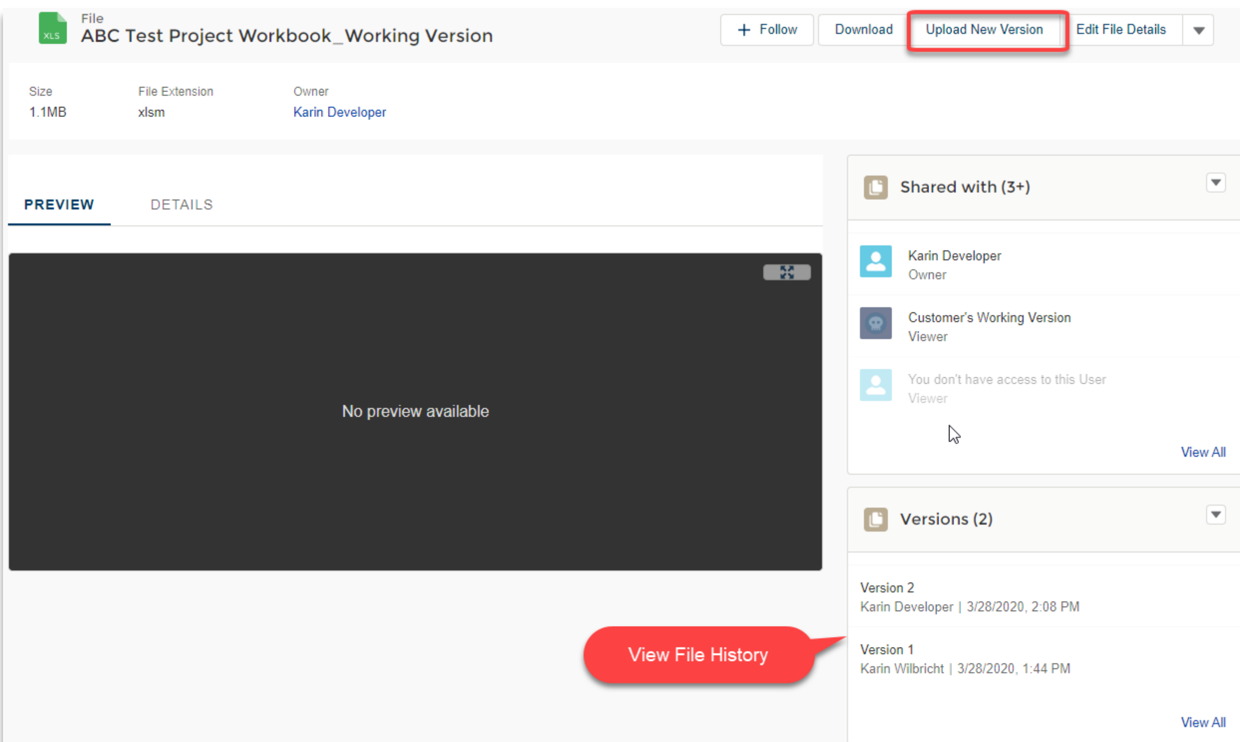
Upload a New File Version

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.

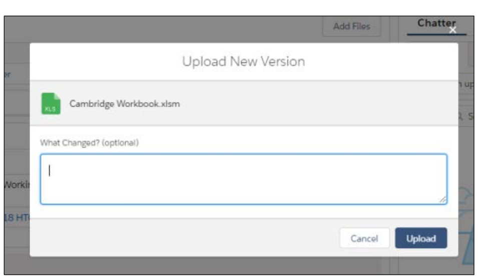
To replace an existing workbook (e.g. upload a new file version), click the 'Open File' link for the workbook type you need to update. This takes you to the File Details screen.



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



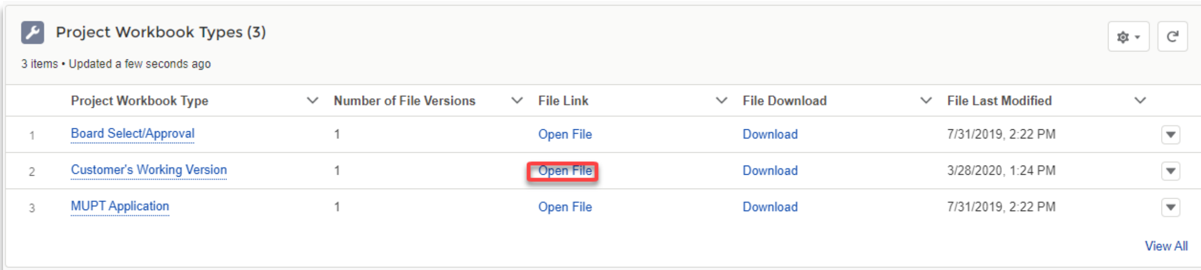
Locate the file you want to upload and click open. Make a note about what changed since the previous version and click 'Upload.'



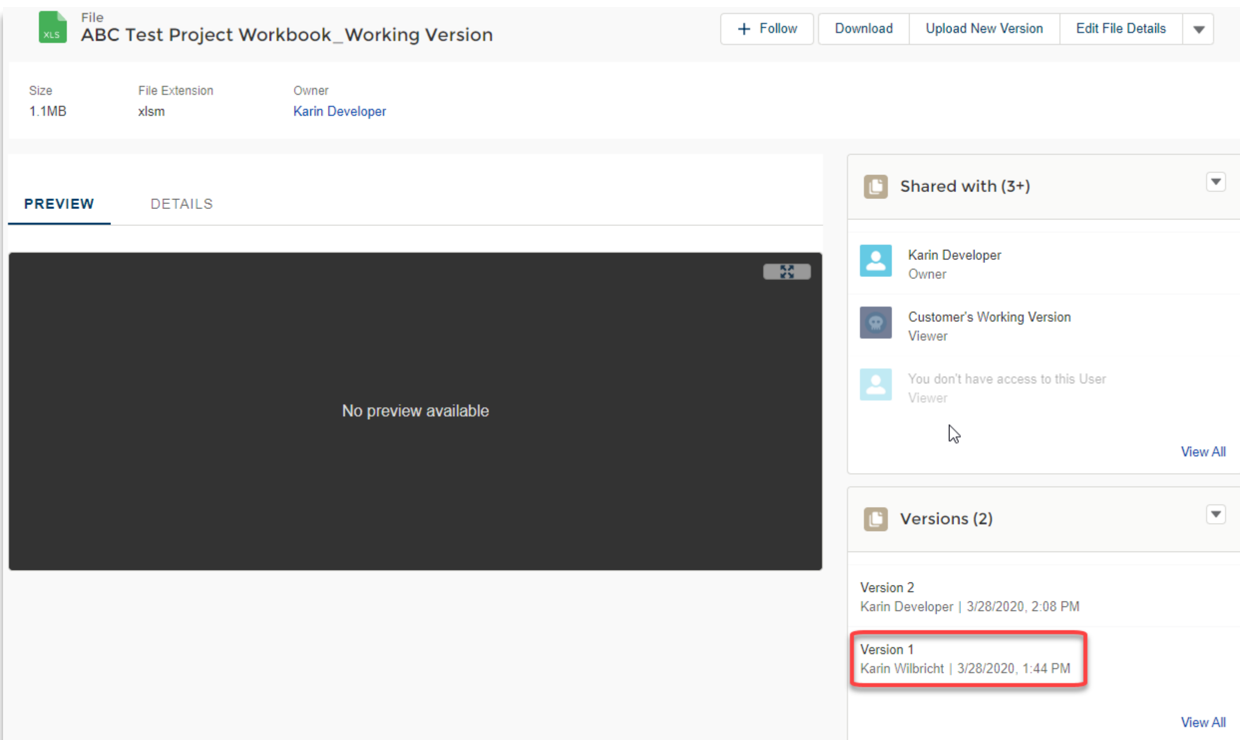
Use the back button to navigate back to the project.

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 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.



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."	The Portal restricts what versions of the workbook will be accepted; the version you uploaded is not valid. 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. 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.
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."	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. 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.
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."	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. • Multifamily Workbook = primary project # • Dual Multifamily Workbook = secondary project # 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.

Questions

Contact mhfa.app@state.mn.us.