## PSIP Job Aid: How to Edit the Document Library

- **OBJECTIVE** Train users on how to access the PSIP Document Library and make updates
- AUDIENCE PERSEC Team

## **INSTRUCTIONS**

Pre-Step: Access the Salesforce Homepage via https://va-vet.my.salesforce.com/.

- 1. Click the **App Launcher** and a search field will appear.
- 2. Type **Files** into the search field.
- 3. Select **Files** from the populated search results.



4. Click on Libraries and the PSIP Document Library folder will appear.



5. Click the **PSIP Document Library** folder and the files that have been uploaded into PSIP will appear.

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6. To add a new form to the library click **Add Files** in the top right-hand corner of the page.

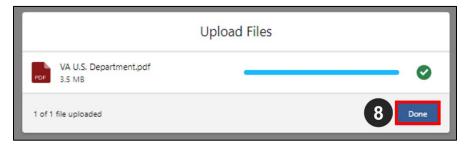
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7. Upload the form by clicking **Upload Files** and select the form you are uploading to the PSIP Document Library.

	Select Files
1 Upload Files	7 R Search Files
Owned by Me	You don't have any files here. Try a different filter, or upload a file.
Shared with Me	
Recent	
Following	
Libraries	
0 of 10 files selected	Cancel Add

8. Click **Done** to save the form after it has completed uploading. You will be taken back to the PSIP Document Library.





## Other actions that can be done using the drop-down menu found next to each document:

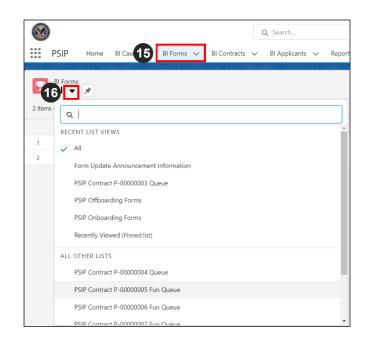
- 9. To download a form from the PSIP Document Library, use the drop-down menu on the right-hand side and click **Download**.
- 10. To share a form with another user within PSIP directly, use the drop-down menu on the right-hand side and click **Share**. You will then be prompted to insert the person's name and add a message. Click done to complete and send the form.
- 11. To view the form details, such as the different versions that have been uploaded into PSIP, use the drop-down menu on the right-hand side and click **View File Details**.
- 12. To overwrite the current version of a form with a new version, use the drop-down menu on the right-hand side and click **Upload New Version**. You will then be asked to upload the new version and have the option to explain what changed between the versions.
- 13. To edit form details such as the name and description, use the drop-down menu on the right-hand side and click **Edit File Details**.
- 14. To permanently delete a form and its history, use the drop-down menu on the right-hand side and click **Delete**.

Title ↑	Last Modified Date	9
PSIP VA Offboarding Supplemental Form	2/22/2022, 6:44 AM	
VA -Other Onboarding Form for Complex Process	1/3/2022, 12:08 PM	10 Download
VA Contract Transfer Form	1/3/2022, 12:08 PM	Share
VA Offboarding Form	1/3/2022, 12:08 PM	View File Details
VA Onboarding Form	1/3/2022, 12:08 PM	12 → Upload New Version
		Edit File Details
		13 Move
		14 Delete



Forms that have also been uploaded into the **Library** can also be accessed in **BI Forms**.

- 15. Click BI Forms in the Tabs Bar.
- 16. Click the black down-down icon and select the desired **BI Forms**. **Note:** To see a list of the **BI Forms** that have already been created, click **AII**.



17. Click the **Related** tab and the list forms will appear. From this tab, users can **Download**, **Share**, and **View File Details** by clicking on the desired form and finding these options at the top of the file preview.

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BI Forms are a way that users can categorize the forms, showing all of the details associated with the category. Details of the forms can be edited by following these steps:

- 18. Click the **Details** tab.
- 19. Click one of the gray pencils to make the fields editable.

BI Form F-0000000			
Relat 18 Details			
✓ Information			
BI Form Number	Wet S	ignature Required	
F-0000000			
Form Name		Update	
F-0000001	/		(19)
Required for BI Case	Date	.ast Updated	•
Onboarding	/ 1/3/2	2022	
Instructions			
To be required for applicants	/		
Update			
PerSec			

- 20. Uncheck the box under **Share Update**.
- 21. Click save to **Save** changes.

3	Q Search	
PSIP Home		
BI Form F-0000000		
Related <b>Details</b>		
✓ Information		
BI Form Number	Wet Signature Required	
F-000000		
* Form Name	Share Update	5
F-0000001		
* Required for BI Case	Date Last Updated	
Onboarding	▼ 1/3/2022	苗
* Instructions		
To be required for applicants		
Update	4	
PerSec		
	Save	

22. Click one of the gray pencils to make the fields editable.



- 23. Make any changes to the desired information.
- 24. Check the box under **Share Update**.
- 25. Click **Save** and the changes will be saved and shared with the PERSEC team.

