PSIP Job Aid:
How to Edit the Document Library

OBJECTIVE

Train users on how to access the PSIP Document Library and make updates

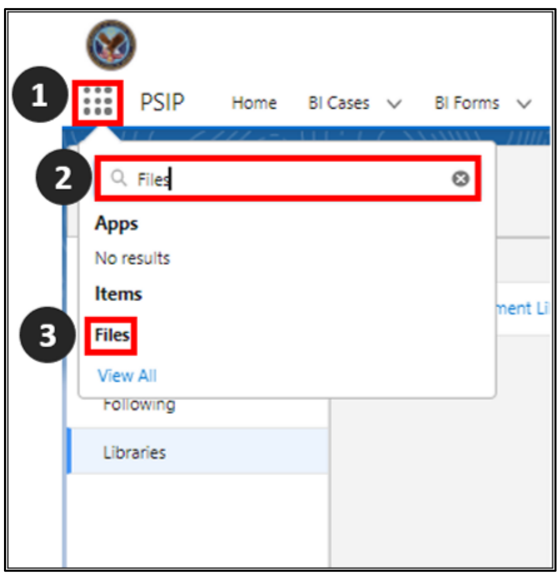
AUDIENCE

PERSEC Team

INSTRUCTIONS

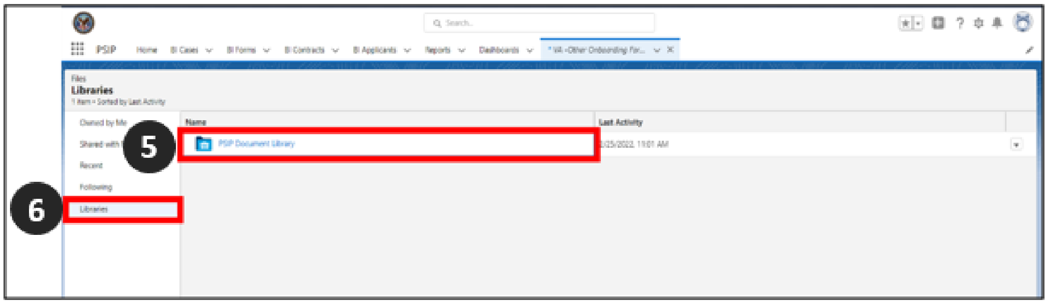
Pre-Step: Access the Salesforce Homepage via https://va-vet.my.salesforce.com/.

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.

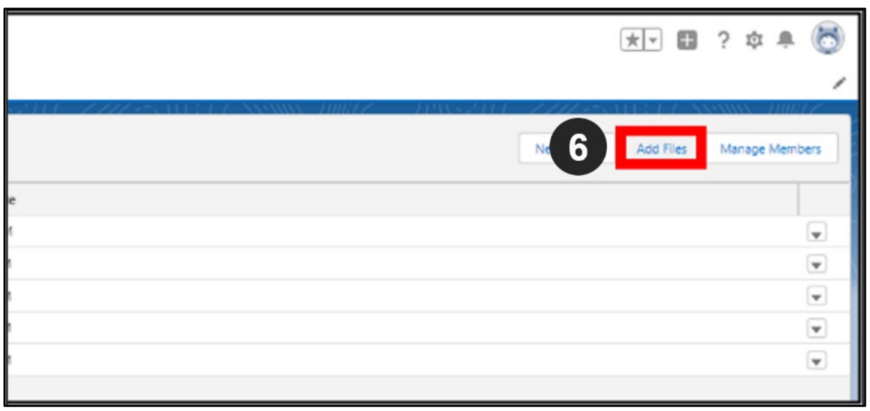


4. Click on **Libraries** and the **PSIP Document Library** folder will appear.

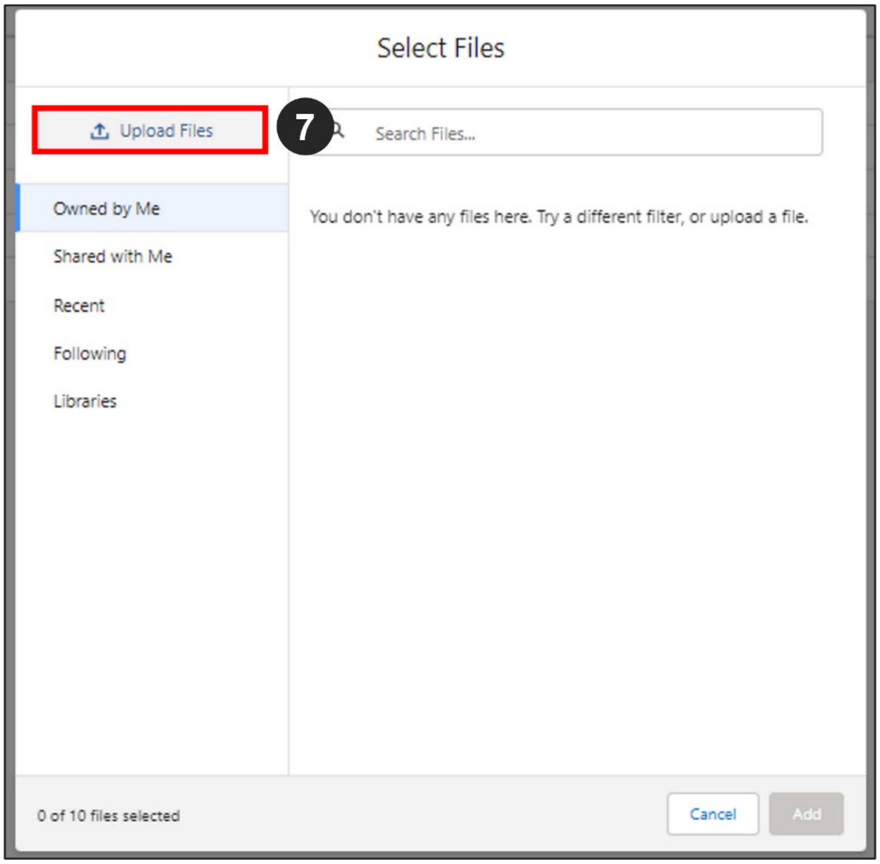
5. Click the **PSIP Document Library** folder and the files that have been uploaded into PSIP will appear.



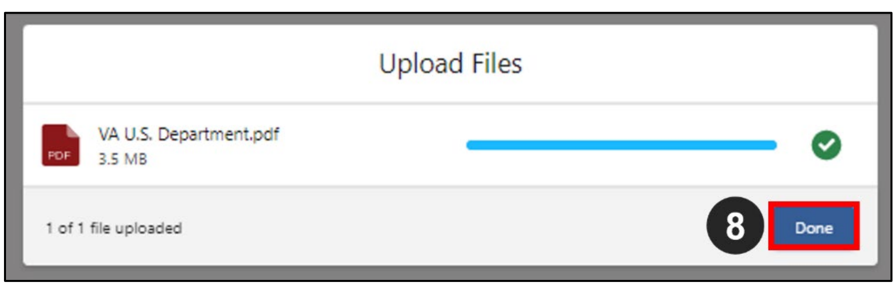
6. To add a new form to the library click **Add Files** in the top right-hand corner of the page.



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



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**.

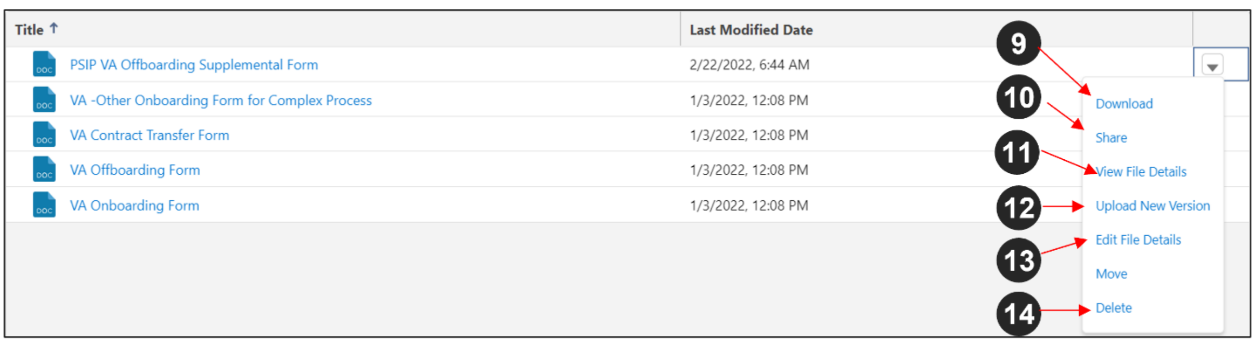
10. To share a form with another user within PSIP directly, use the drop-down menu on the right-hand side and click **Share**. You will then be prompted to insert the person’s name and add a message. Click done to complete and send the form.

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**.

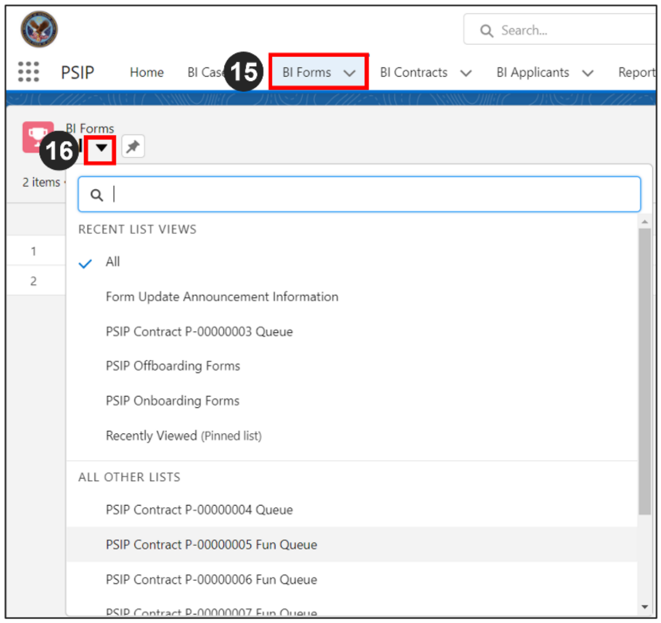
14. To permanently delete a form and its history, use the drop-down menu on the right-hand side and click **Delete**.



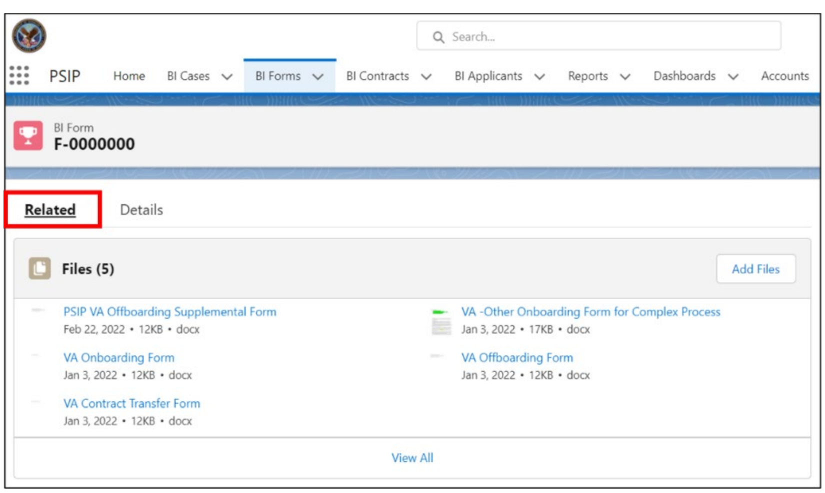
Forms that have also been uploaded into the **Library** can also be accessed in **BI Forms**.

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 **All**.



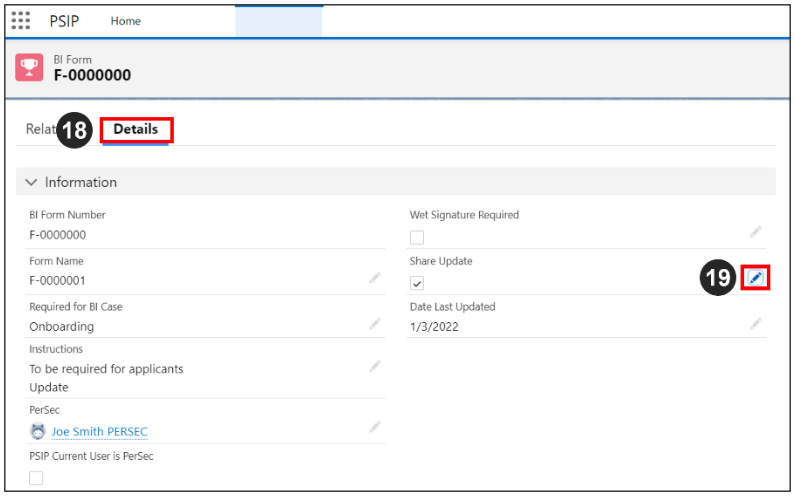
17. Click the **Related** tab and the list forms will appear. From this tab, users can **Download**, **Share**, and **View File Details** by clicking on the desired form and finding these options at the top of the file preview.



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:

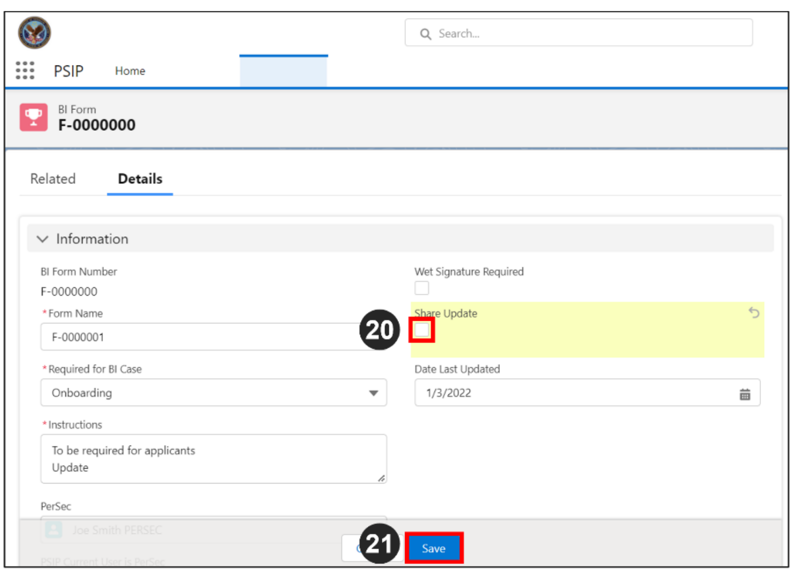
18. Click the **Details** tab.

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



20. Uncheck the box under **Share Update**.

21. Click save to **Save** changes.



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.