Columbia University Finance Training

Job Aid: How to edit and upload files in the Forms and Documents library

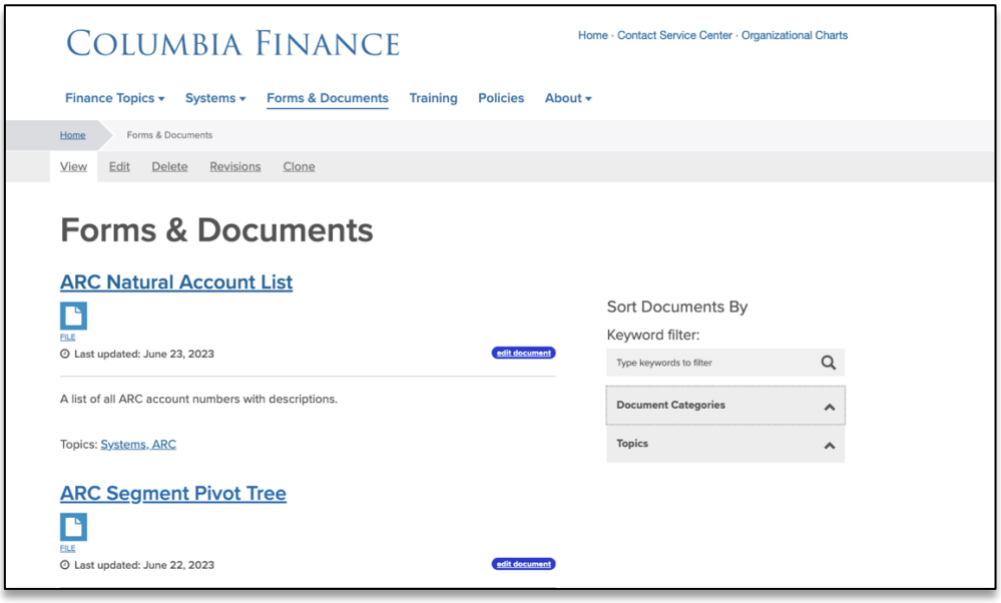
This job aid details the process of adding new files to the Forms and Documents library and how to update existing documents. It is designed for users who make edits to any documents in use on the following websites: Finance; Registrar; Student Financial Services; and the Student Service Center.

What is the Forms and Documents library?

The Forms and Documents library is where documents are hosted on the site and searchable by users according to category or topic. The library makes it easier for staff to update a file in as few steps as possible. When you update a document content page, any location where that document page is linked on the site will update as well, no matter what change has occurred to the file name. To access the Forms and Documents library, look for the label **Forms and Documents** in the main menu navigation ribbon visible on all pages. When you click on an individual document, you will see a link to the file at the bottom in addition to a summary that helps the user understand the file they are about to open.

Example of a document content page:

Example of the forms and docs library:



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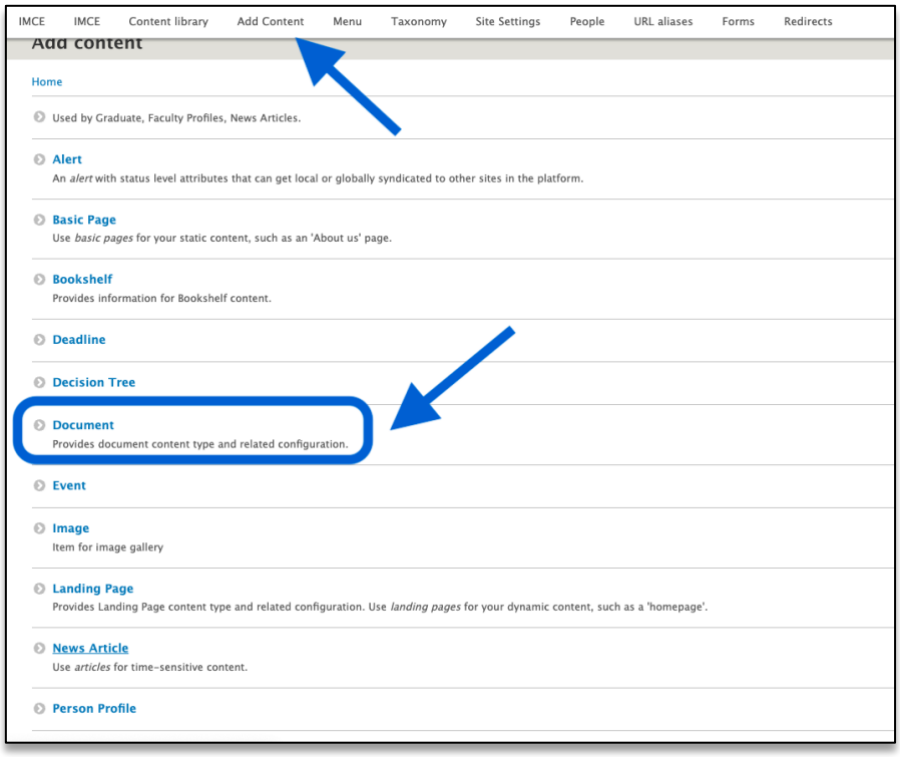
How do I add a *new* document to the library?

This is for adding a new document that wasn't previously on the site. If a previous version of the document exists (ex: previous year's loan authorization form), please follow the instructions farther down to edit an existing document page.

1. Log in to the **site you're trying to edit**. To log in, go to the homepage URL and type "/user" at the end of the URL (do not include the quotation marks), then hit **Return** to navigate to that page. You will be asked to authenticate, which will log you into the site and return you to the homepage.
2. On the editor toolbar at the top of the page, **click Add Content.** You will be taken to a list of different content items you can add. **Click Document.**

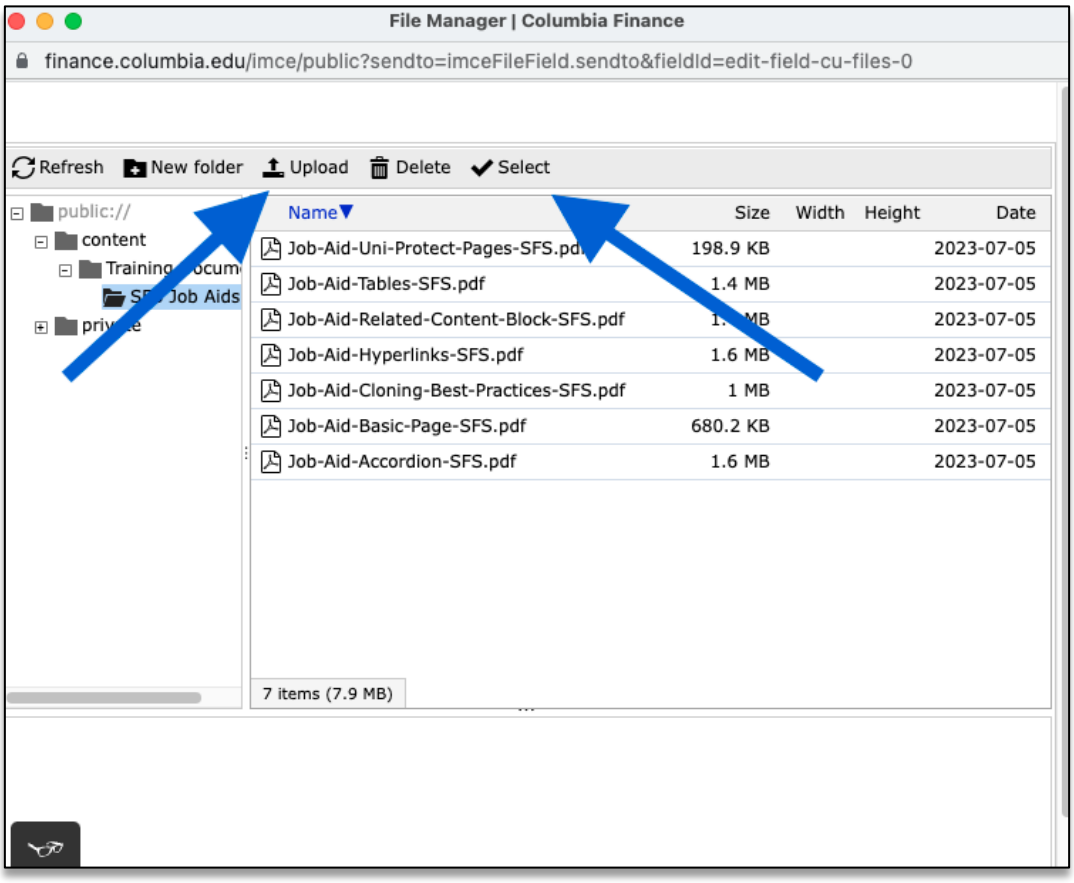


3. Fill in the **Title Field** with the title of your document. Add the current date to the **Last Updated Field.**
4. Click **Open File Browser** to add your new document. This will take you to the IMCE.

5. Within the IMCE, find the folder where your content will be housed.

*It is important to keep the IMCE organized so other users can find what they are looking for. Be careful with what you add, including folders, because we **cannot drag-and-drop** within the IMCE. **To move a file from one folder to another it must be deleted and re-added**. It is very important that you consult the Finance Web Team if you are unsure about editing or moving files in the IMCE.*

Once you find the correct folder for your new document, **click the Upload button.** Once your file has been uploaded into the IMCE, click the file you wish to use and **click the Select button.**



After you click Select, you will be brought back to the backend of the document page and your document will appear under Documents.

6. Fill in the **Document Categories** and **Topics** fields with the corresponding content. The taxonomy will autofill as you type (ex: if the category is "Tools" and you type the letter T, the category "Tools" will appear).

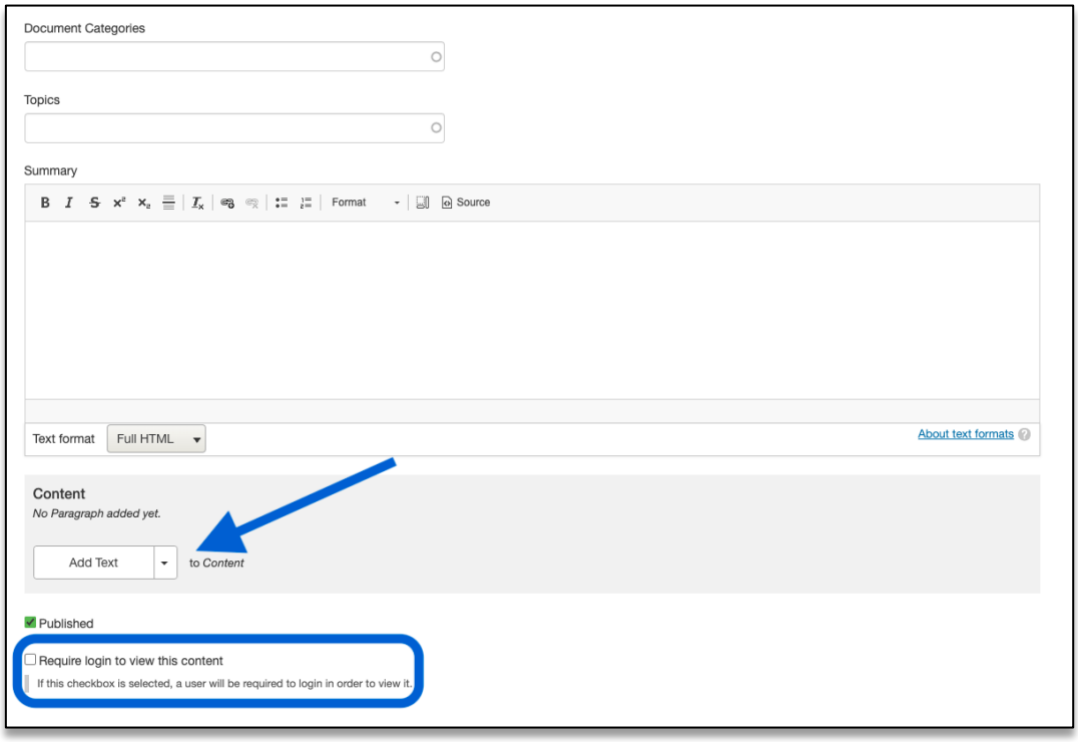
   *You can view the **Categories** and **Topics** fields by visiting the **Forms and Documents landing page** and reviewing the filtering options in the righthand menu.*

7. Add a brief description of your document to the **Summary Field.** This is what will appear in the larger Forms and Documents library menu to give users information about your document.
8. Below the summary, **click Add Text** and add the brief description of your document there, too.

   Please be advised, you must enter a description of the document in this text box or the document will not link appropriately. This is an unfortunate quirk of the CMS.

   This text will appear on the document page itself above where users will click on the link to your document.

9. If you want to keep this document UNI-protected, **click Require Login to View This Content.** This means only authenticated users in the Columbia community can see the page.
10. **Click Save at the bottom of the page to create the new document. If you do not click Save, the document will not be added and you will need to redo the steps again.**



11. After you select **Save,** you will be brought back to the user view of the document page you just created. There will be a green bar near the top navigation to alert you the document page has been created. Your new changes will appear immediately on the page.

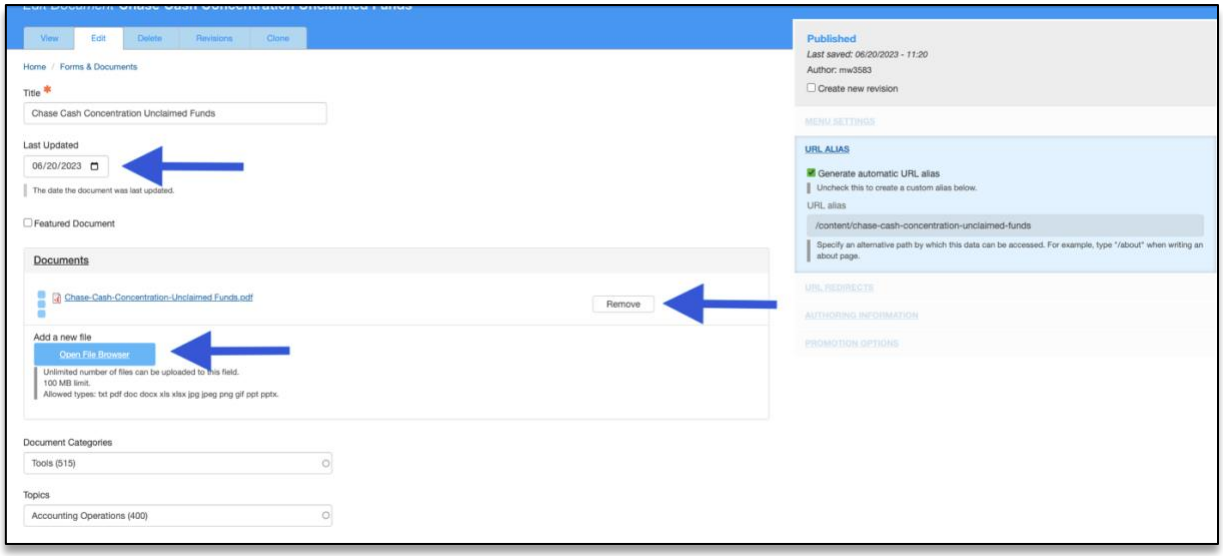
How do I edit an existing document in the library?

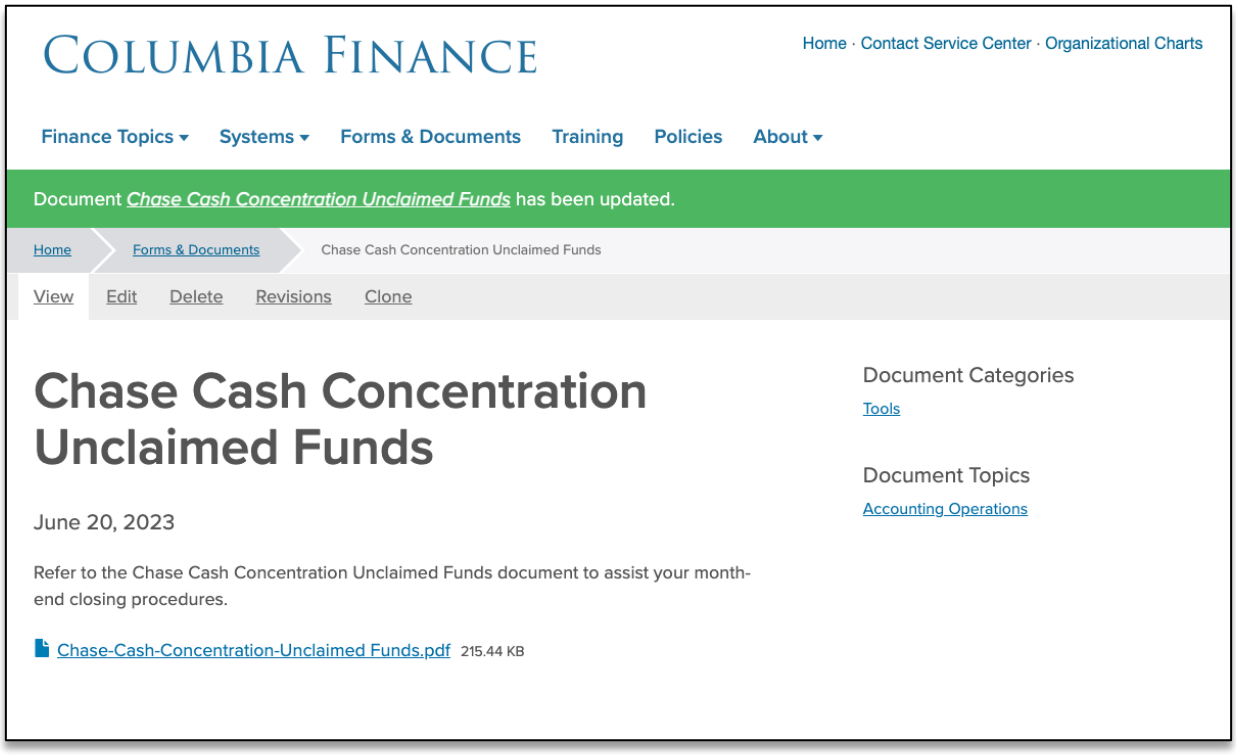
This is when the document you want to add to the site already exists on the site. You must navigate to the unique document page within the Forms and Documents library to edit the file. Do not replace files via hyperlinked locations because this will not update the file in the library, only in that one spot.

1. Log in to the **site you're trying to edit**. To log in, go to the homepage URL and type "/user" at the end of the URL (do not include the quotation marks), then hit **Return** to navigate to that page. You will be asked to authenticate, which will log you into the site and return you to the homepage.
2. Navigate to the Forms and Docs library to look for the document you want to edit. If you already have the URL for the unique form you wish to edit, navigate to that page directly.
3. Look for the editor ribbon on the document page toward the top and select **Edit**. This editor ribbon will only appear if you are logged into the site. Once you click **Edit**, you will be taken to a backend editor view of the page.
4. **Click Remove** on the document you want replace, then **click Open File Browser** to add the new replacement file to the IMCE. This will take you to the IMCE.
5. Within the IMCE, find the folder where your file will be housed. It is important to keep the IMCE organized so other users can find what they are looking for with ease. You should delete the old, outdated file from the folder at this time so the folders do not become overwhelming.
6. Once you find the correct folder for your new file, **click the Upload button.** Once your file has been uploaded into the IMCE, **click the Select button.**
7. Update the **Last Updated Date Field** to the current date to indicate to users a recent update to the page has occurred. If the document file hasn't significantly changed from the prior version, you should not need to update

the summary and text box along with the date.

8. Scroll down to the bottom of the page and select **Save.** If you do not click **Save**, the document will not update.
9. After you select **Save,** you will be brought back to the user view of the document page you just edited. There will be a green bar near the top navigation to alert you the document page has been created. Your new changes will appear immediately on the page.





Getting Help

While editing a page, if you accidentally delete the wrong content and need to start over, simply click the **back arrow** in the top left of your browser or close out of the browser tab or window completely. **As long as you do not click Save, any changes made to the page will not publish.**
If you need assistance creating, editing, removing, or recovering a document on your website, please contact the Finance Web Team at **financewebteam@columbia.edu with a summary of your needs.**