

Documentation Library Guide

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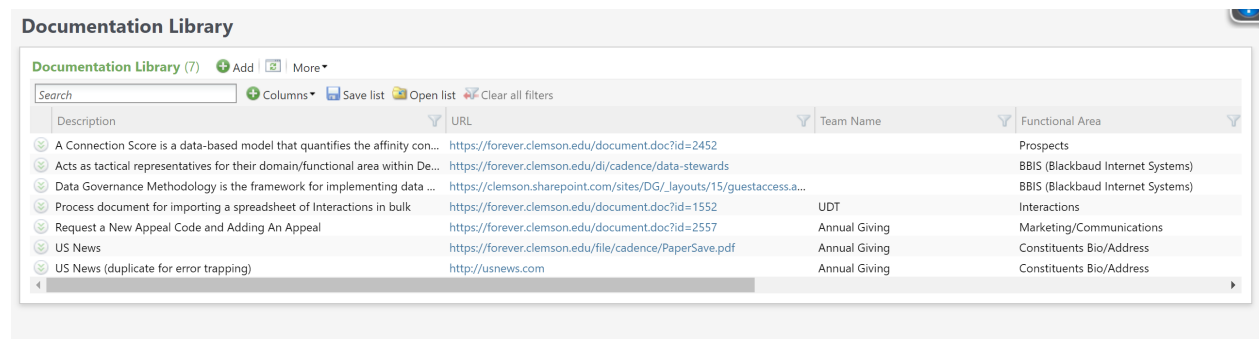
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Document Library Guide

Adding New Document Link

There are three functional areas where to add new document link in CADENCE,

1. Constituents under Data Steward Tab
2. Support & Training
3. Analysis under the Information Library section



Click Add button and input the following information for each document

The screenshot shows a modal window titled 'Add a record to the documentation library'. The form contains the following fields:

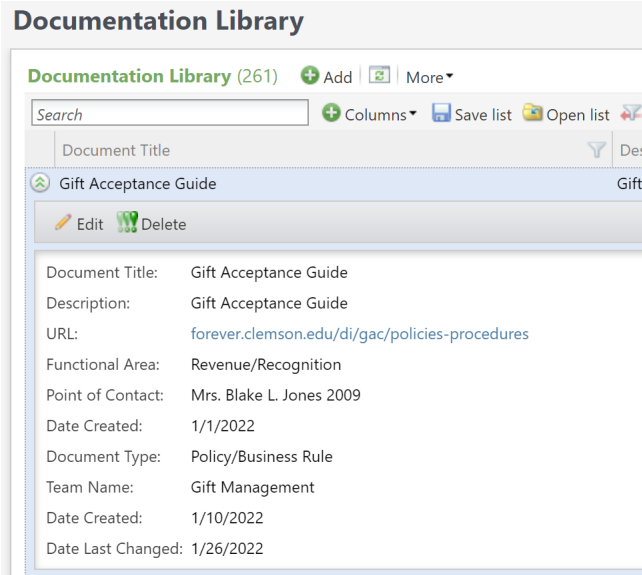
- Document Title:
- Description:
- URL:
- Functional Area:
- Point of Contact:
- Date Last Reviewed:
- Document Type:
- Team Name:

At the bottom of the form are 'Save' and 'Cancel' buttons.

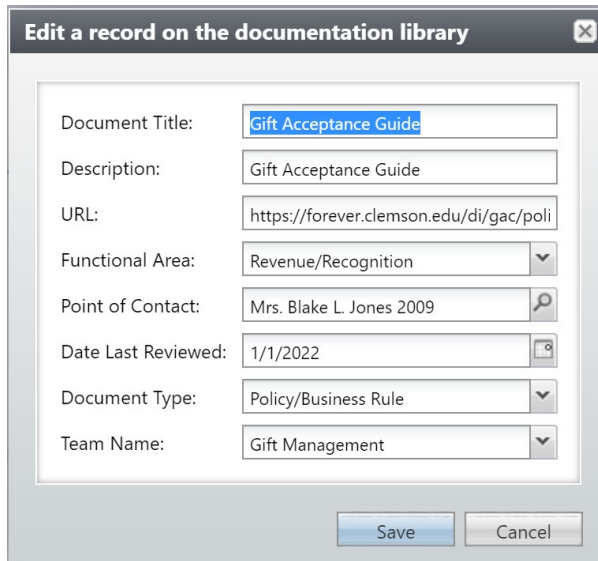
1. Document title
2. Description to summarize the purpose and content of the document
3. URL link to the document or where it is stored
4. Functional area from the dropdown
5. Data Steward Responsible
6. Date Last Reviewed or Created
7. Document Type from the dropdown
8. Team Name

Edit Existing Documentation Library Record

Click the chevron button to expand the document details then click Edit button:



Update details example when the document was reviewed Data last reviewed field will be updated manually and click save button.



Filter Document Record

Each column can be filtered example below type search word then click apply.

Documentation Library

Documentation Library (7) Add More

Search Columns Save list Open list Clear all filters

Description	URL	Team Name	Functional Area
A Connection Score is a	https://forever.clemson.edu/document.doc?id=2452		Prospects
Acts as tactical represent	https://forever.clemson.edu/di/cadence/data-stewards		BBIS (Blackbaud Internet Systems)
Data Governance Method	https://clemsont.sharepoint.com/sites/DG/_layouts/15/guestaccess.a...		BBIS (Blackbaud Internet Systems)
Process document for impo	https://forever.clemson.edu/document.doc?id=1552	UDT	Interactions
Request a New Appeal Code and Adding An Appeal	https://forever.clemson.edu/document.doc?id=2557	Annual Giving	Marketing/Communications
US News	https://forever.clemson.edu/file/cadence/PaperSave.pdf	Annual Giving	Constituents Bio/Address
US News (duplicate for error trapping)	http://usnews.com	Annual Giving	Constituents Bio/Address

Request

Clear filter Apply Cancel

Sample result below:

Documentation Library

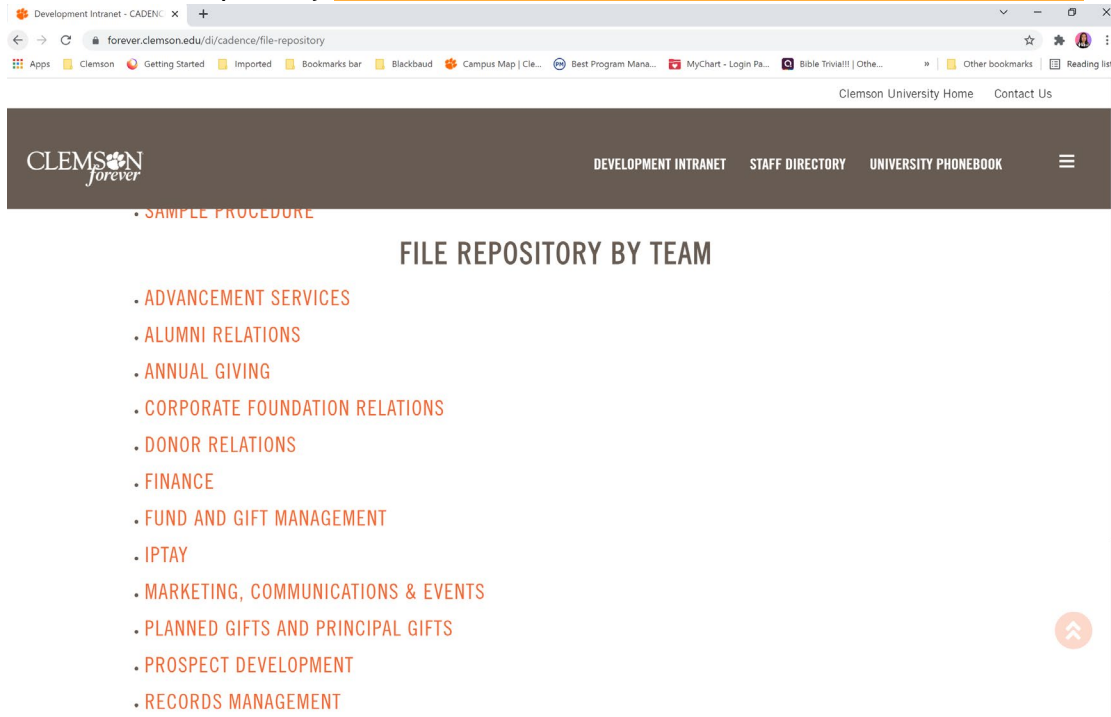
Documentation Library (1) Add More

Search Columns Save list Open list Clear all filters

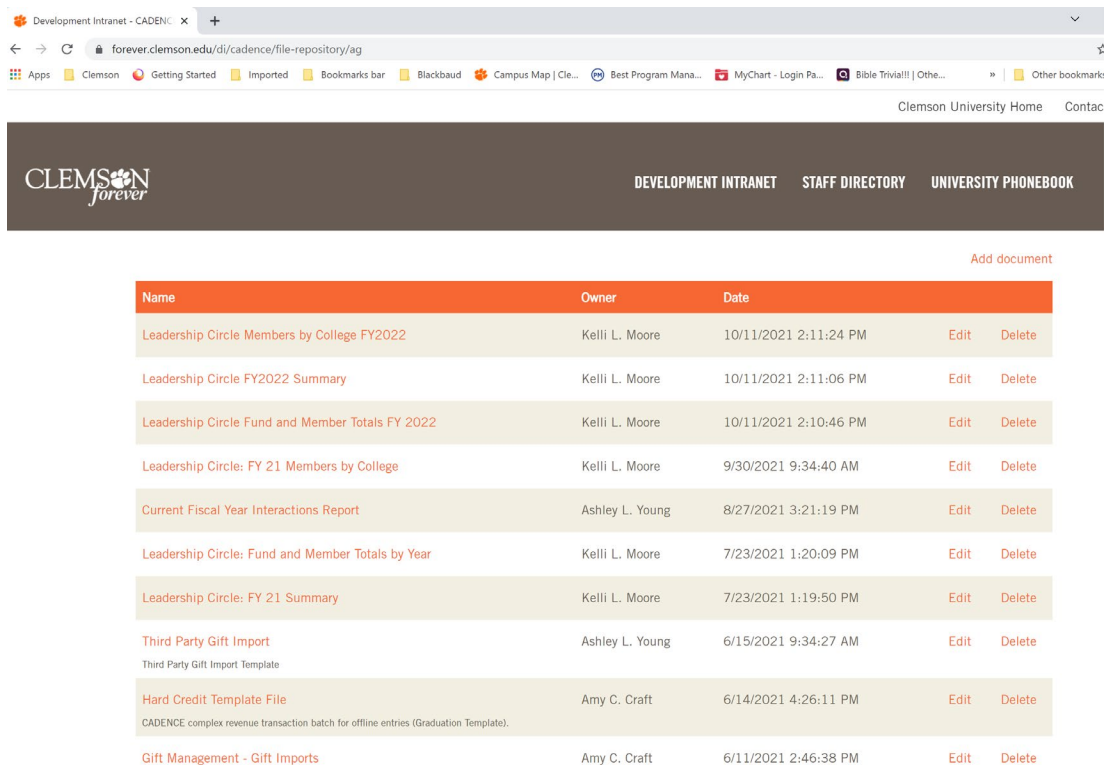
Description	URL	Team Name	Functional Area
Request a New Appeal Code and Adding An Appeal	https://forever.clemson.edu/document.doc?id=2557	Annual Giving	Marketing/Communications

How to upload and edit file in Development Intranet (BBIS)

1. Go to the file repository <https://forever.clemson.edu/di/cadence/file-repository>



2. Select the corresponding team example annual giving



Documentation Library Guide

3. Click Add document then it will ask you for Name and Description then choose file to upload then click UPLOAD.

* Name:

Description:

* File:
 No file chosen

4. Next step is to [add the new link of the added document to CADENCE Document Library Page](#).

5. While to replace the existing file with updated version click Edit button

CLEMSON forever

DEVELOPMENT INTRANET STAFF DIRECTORY UNIVERSITY PHONEBOOK

Add document

Name	Owner	Date	
Procedure for Interaction Imports	Ashley L. Young	8/17/2021 10:42:03 AM	Edit Delete
Clemson Club Template	Ashley L. Young	7/7/2021 4:21:46 PM	Edit Delete
PDF: Staff Guide	Ashley L. Young	4/28/2021 10:17:40 AM	Edit Delete
Procedure for Clemson Club Gifts	James L. Huff	1/5/2021 3:58:45 PM	Edit Delete
Procedure for Marking Constituent Origin Attribute	James L. Huff	9/21/2020 2:37:06 PM	Edit Delete
This procedure covers what needs to be done after using any batch process in CADENCE that creates new constituents so that the record has a properly created constituent origin attribute.			
Procedure for Marking prospects in bulk	James L. Huff	9/15/2020 1:36:22 PM	Edit Delete
DAR Interaction Template	James L. Huff	9/15/2020 1:33:06 PM	Edit Delete
Prospect Import Template	James L. Huff	8/26/2020 12:38:28 PM	Edit Delete
IT - Procedures	Ashley L. Young	8/6/2020 8:42:20 PM	Edit Delete

6. Edit Description and choose the updated version of the file then click UPDATE button.

* Name:

Procedure for Interaction Imports

Description:

* File:

Choose File No file chosen

Original file:

Procedure for Interaction Imports.docx

UPDATE

CANCEL

Note: When editing, do not update the NAME field to avoid confusion with the initial file name.

Document Library Process Flow

