

Ektron Website Quick Reference

Procedure for adding a new document to the CMS

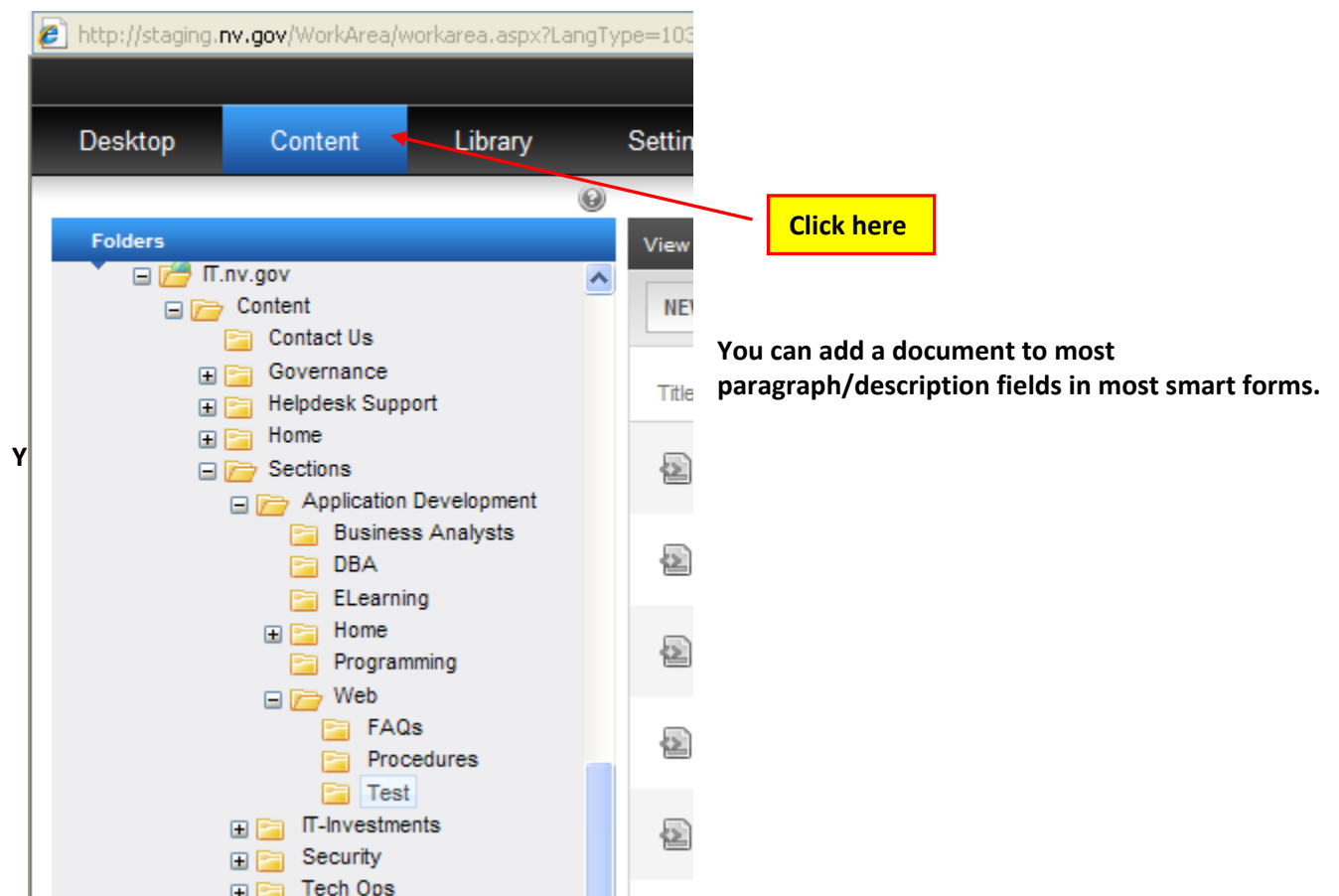
There are two ways to upload your document.

~One option is to upload the document from within the content block or smart form you want it to appear on.

~The other option is to upload the document before you add it to the content block (or smart form) you want it to appear on.

Upload Document Directly to Smart Form

In the WORKAREA make sure you are in the CONTENT tab area, and then navigate to the folder containing the smart form or content area you wish to add the document or file to. Open the smart form or content area.



You can add a document to most paragraph/description fields in most smart forms.

In the smart form or content area, enter the document title, description and select the file type, and then click the icon to add the link and import the document. This example uses the DOCUMENTS Template.

The screenshot shows a form with two sections: 'Document' and 'File'. The 'Document' section has fields for 'Document Title' and 'Document Date'. The 'File' section has a 'Type' dropdown set to 'HTML' and a 'File' icon. Red arrows point from yellow callout boxes to these elements: 'Enter Document Title' points to the title field, 'Enter Document description' points to the description field, 'Select file type' points to the 'HTML' dropdown, and 'Then, click this icon to import the document and add the link' points to the 'File' icon.

When the LINK MANAGER dialog box appears, copy the document title into the tooltip area, then click the URL button. NOTE: This entering information in the Tooltip field aids accessibility

The 'Link Manager' dialog box is shown with the 'Hyperlink' tab selected. It contains fields for 'URL' (with a '...' button), 'Existing Bookmark' (set to 'None'), 'Link Text', 'Type' (set to 'http:'), 'Target' (set to 'Target'), 'Tooltip' (containing 'Delete a Previously Uploaded Document'), and 'Style' (set to 'No Class'). There are 'OK' and 'Cancel' buttons at the bottom. Red arrows point from yellow callout boxes: 'Copy here' points to the 'Tooltip' field, and 'Then, click here' points to the '...' button next to the 'URL' field.

Navigate to the folder you want to upload the document to and change the type to "FILES", then click the ADD LIBRARY button.

Library Folder: "Testfiles"

ADD LIBRARY Files English (U.S.) Change to FILES

Title Click here

Delete Document Previously Posted
uploadedFiles/ITnvgov/Content/Sections/Application_Development/Web/Test/DeleteDoc_Procedures.pdf

Enter the document title and click the BROWSE button.

To upload and insert a local file:

ADD LIBRARY

Title: Enter title

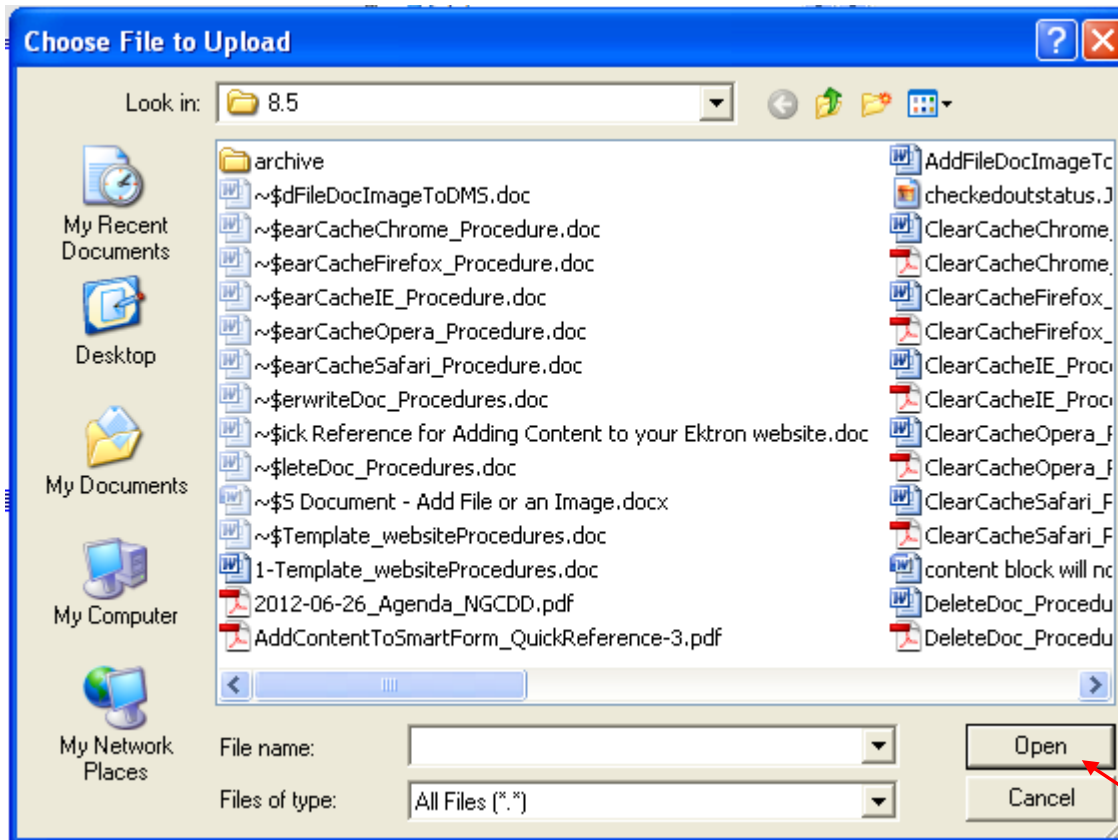
Filename: Browse... Then, click here

Description: Description

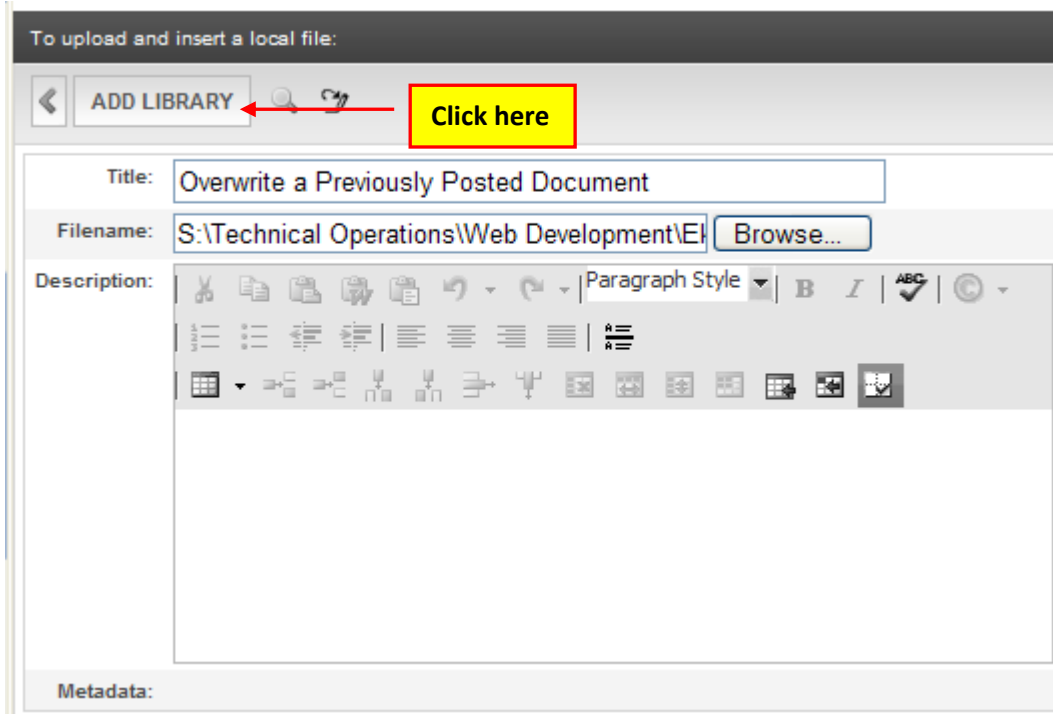
Paragraph Style B I ABC

Metadata:

Navigate to the file you want to upload. Double-click to select it, and then click OPEN.



Click the ADD Library button to import and add your document to CMS.



The LIBRARY FOLDER will disappear and in the Link Manager dialog box you will see the link path has been added in the URL field. It is recommended that you **copy the URL path to the LINK TEXT field** as this is displayed in the smart form and will make it easy to locate the folder the document resides in if you ever have to replace it.

The screenshot shows the 'Link Manager' dialog box with the 'Hyperlink' tab selected. The URL field contains the path '/uploadedFiles/ITnvgov/Content/Sections/App'. The Link Text field contains 'opment/Web/Test/DeleteDoc_Procedures.pdf'. A red arrow points from a yellow box labeled 'Copy to this field' to the Link Text field. Another red arrow points from a yellow box labeled 'Click here' to the OK button.

The finished product will look similar to the print screen showing below.

The screenshot shows the smart form with the following details:

- Document**
 - Document Title: Delete a Previously Uploaded Document
 - Document Date: [Empty]
 - Document Description: [Empty]
- File**
 - Type: PDF
 - File: /uploadedFiles/ITnvgov/Content/Sections/Application_Development/Web/Test/DeleteDoc_Procedures.pdf

Go to the browser page in the staging environment you were trying to see changes on and click the refresh button.



Click on the refresh button to verify the deleted document is no longer there.

NOTE: If you were having trouble seeing your changes, you should see your changes now in the staging environment for your site.

If not, please try viewing your changes in another browser, on another computer or on a mobile device if that is an option. Clear your browser cache. If that still doesn't help, please contact your Agency's PC/LAN Tech for assistance.