

# Ektron Website Quick Reference

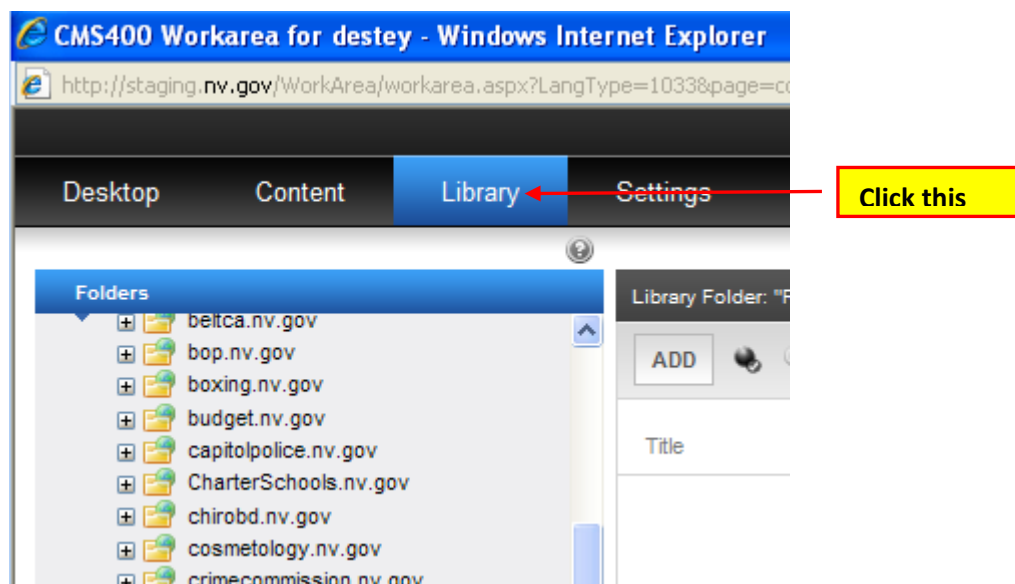
## Procedure for adding a new document to the CMS

There are two ways to upload a file.

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

### *Upload Documents to Library Prior to Updating the Smart Form*

**Make sure you are logged in to the Content Management System, and then click the LIBRARY tab at the top of the WORKAREA. Note: The WORKAREA by default opens to the CONTENT tab.**



Next, navigate to and click on the folder you want to upload the new document to.

The screenshot shows a file management interface. On the left is a tree view of folders. The 'Web' folder is selected. On the right is a table of files. A red arrow points from a yellow callout box to the 'Web' folder in the tree.

Title	ID	Date Modified
Dairy Commission Sitemap	3553	3/17/2012 6:40:46 AM
Dairy Commission sitemap final	3939	4/5/2012 10:00:00 AM
Dairy Sitemap PDF	3558	3/17/2012 6:40:46 AM
How templates work	3555	3/17/2012 6:40:46 AM
IT Final Sitemap	3938	4/5/2012 10:00:00 AM

Then click the ADD button in the right pane.

The screenshot shows a close-up of the file management interface. The 'ADD' button is highlighted. A red arrow points from a yellow callout box to the 'ADD' button.

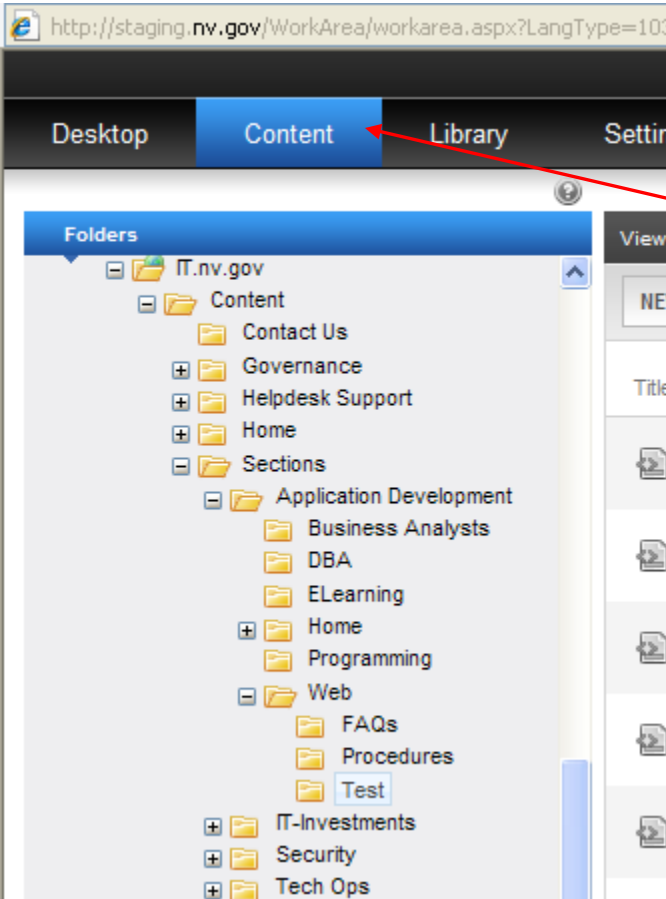
Title	ID	Date Modified
Dairy Commission Sitemap	3553	3/17/2012 6:40:46 AM

Then click the **ADD** button in the right pane. Then, click the **BROWSE** button in the “**ADD LIBRARY ITEM TO FOLDER**” dialog box and navigate to the form you wish to upload, and then enter the document name.

Then click the **SAVE** button

Your document should now appear in the right pane as shown below. **NOTE:** You may need to change the drop-down from the default “**Images**” to “**Files**” to see the document uploaded.

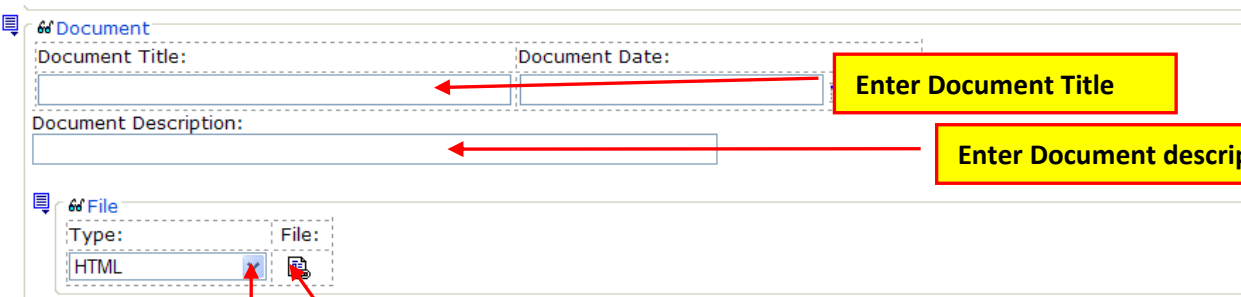
Next, in the WORKAREA click the CONTENT tab, then navigate to the folder containing the smart form or content area you wish to add the document or file to. Open the smart form or content area.



Click here

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

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



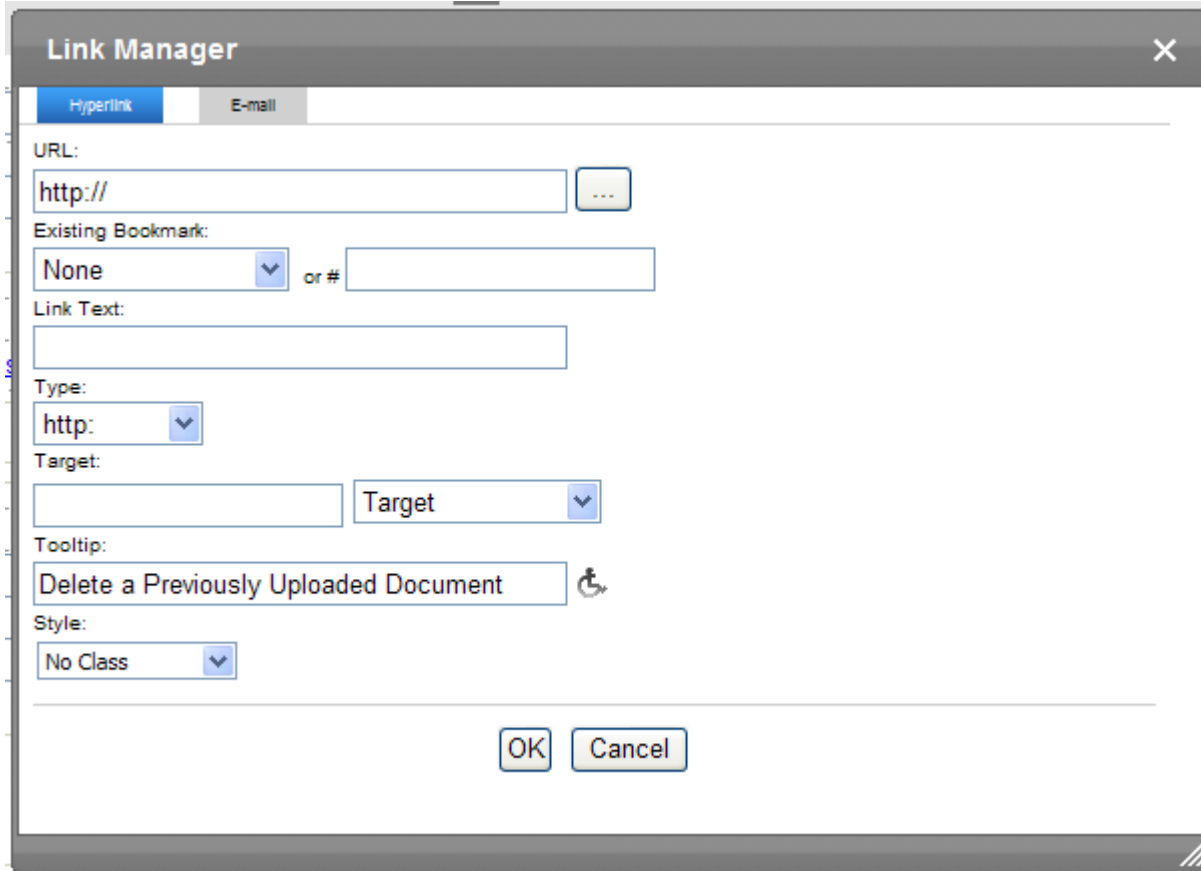
Enter Document Title

Enter Document description

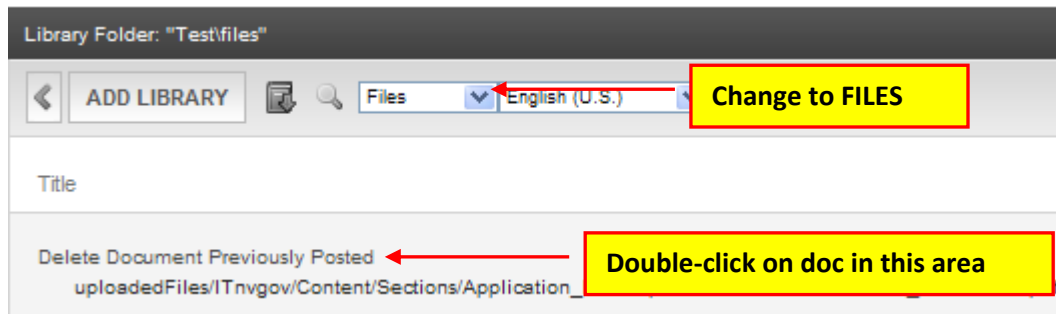
Select file type

Then, click this icon to add the link to the doc previously uploaded

When the LINK MANAGER dialog box appears, copy the document title into the tooltip area, then click the URL button. NOTE: This step is done to provide for accessibility

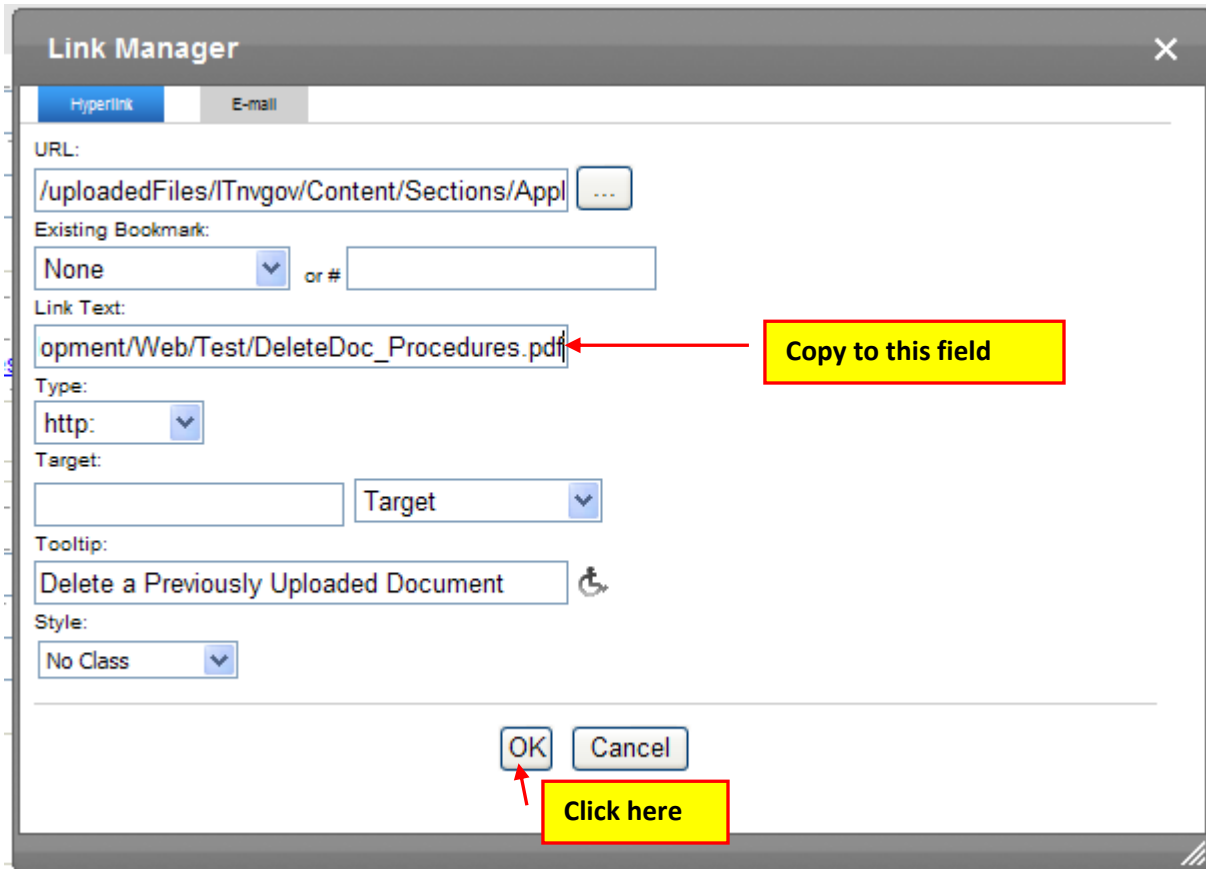


Navigate to the folder containing the document you want to link to and change the type to "FILES".

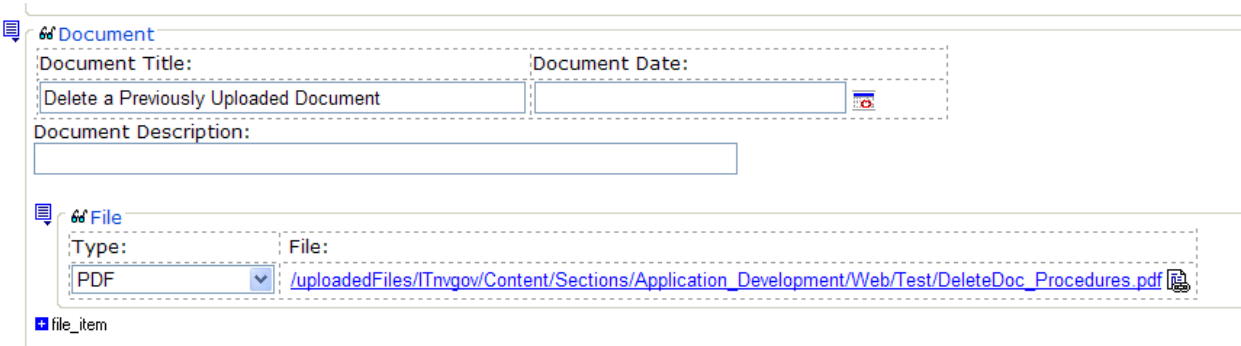


Double-click on the document title to add it as your link.

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



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.**