How to add a document to the CMS and link to one in your pages

## To create a single document:

NB: when creating a document make sure the asset you are currently on is of the same type as the document/s you plan on creating. I.E. if you are creating a PDF document, make sure you have a PDF currently selected. Creating a document (as with an image) requires you to be on an asset of the same type in order to create another asset of that type.

- 1. Click the **New** button in the toolbar. The Asset Creation Wizard will appear.
- 2. From the Categories Choose **Files** > **Create** [**File Type**]. In this instance we will select PDF, but you have a number of options depending on the type of file you wish to upload.



3. A new section will appear asking you to fill in details about the document you wish to upload.

PDF Upload a Porta	ble Document Format (PDF) file.	9
+ Add more	Details Upload File ★ Browse_ No file selected. No file selected	
	Enter a name 🖈 Friendly name for the file Show in menu? Yes No This option will affect all link locations	
	Create locations Select the locations to create this asset under  No locations are currently set Select New Location OR Select Current Asset	
Back	Create	

4. **Upload File**: this field allows you to select the file to upload to the *Document* asset. To select a file, click the browse button. The file upload pop-up will

appear where you can select which document to upload. **NB:** try and load documents that are as small in size as possible.

- 5. Enter a name for the document
- 6. **Show in menu:** this field allows you to select whether or not to show the file in the navigation menu of the site.
- 7. Under the **Create locations**, click the Select New Location button. The asset finder will appear and you can navigate to the folder you wish to create your new document. If you select more than one asset location (folder), the newly created asset (document) will be linked into each location.

Asset Finder Select the asset you wa	int to vi	iew, edit or use					Refresh Assets 🔇	×
Media [10250] Documents (11)	[1081	17] Wales (13) [65690] Clwyd-De	nbigh (0)	$\rangle$				
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		(10831] Movies (7)	7	🧊 (10817) Wales (13)	13	📁 [65690] Clwyd-Denbi		
				jiii (10818) About the WI	5	is [65691] Clwyd-Flint (0)		
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				ji [10822] WIE and WI L	4	🧊 [65695] Gwynedd-Me 🛛 1		
				jiii (10823) Media centre	2	🧊 (65699) Pembrokesh		
				jilli (10824) The WI in Wa	8	ji [65696] Powys-Breck		
				[68927] Post live test	4	🧊 (65697) Powys-Montg		
						jj [65698] Powys-Radn		
						jj [65700] Sir-Gar-Car		
						Current Selection 📁 [65690]	Clwyd-Denbigh (0) #65690	Select

To remove a document from the list of asset locations, click the remove asset icon  $\square$ .

**NB:** make sure you add your document in the Media site as shown in the image above, and not the National Federation ... site.

- 8. Click the Create button.
  - a. To Create another File of the same type click Restart Wizard
  - b. To Edit the file you just created click Edit
  - c. To return to where you were before creating the file click Close

## Creating multiple documents at a time – currently unavailable

- 1. Click the **New** button in the toolbar
- 2. From the Categories Choose **Files** > **Create** [**File Type**] in this case image
- 3. Click the **Add More** button (top left hand corner), + Add more And keep clicking until there are as many files as you would like in the left

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hand column (up to 10 files at a time)

- 4. Follow the steps above for filling in the relevant fields
- 5. If you change your mind about creating one (or more) of the files click the **Delete** icon next to that asset.
- 6. Click Create Button
  - a. To Create another file (of the same type) click Restart Wizard
  - b. To Edit the file you just created click Edit

c. To return to where you were before creating the file click **Close** 

## Linking to a document within a page

Now that you have added your documents to the CMS, you need to link to them in the main content of your pages.

- 1. Navigate to the page in which you want to link to your documents. You can use the asset finder to do this.
- 2. Go to edit mode and then select the Content section.

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Details	Content	Metadata	Workflow Linking URLs	
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			4	
			WYSIWYG Content Container	\$
			Insert document links below	
			Link to newsletter	
			Link to diary dates	
			+	

3. Highlight the text you want to link to the document in the main content area

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and then click the link button that looks two chain links

A drop down menu will appear with fields to fill in.



4. Click the button that looks like a target sight to the right of the URL field. This will bring up the asset finder. Locate and select the document you wish to link to using the asset finder. The image ID number will then appear in the URL field. A preview of the image will also appear.



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- 5. If it does not have a title you can give it one. The title will appear when someone hovers their mouse over the image.
- 6. Click the update changes button. A link to your document will now appear in the text you highlighted in the main content area of your page.

WYSIWYG Content Container
Insert document links below
Link to <u>newsletter</u>
Link to diary dates
<ol> <li>Click Preview in the black toolbar along the top of the window to te Links will always turn text green and underline the text when you b</li> </ol>

- st the link. over your mouse over it.
- 8. You can remove a link by clicking your cursor within the linked text, while in

edit mode, and then clicking the broken chain button **NB:** always remove a link before deleting the text of the link.

9. Remember to save your changes.