## **Documents**

### **Introduction To The Documents Module**

The Documents Module produces a list of documents with links to view (depending on a user's file associations) or download the document. Documents can be located within the site, or can be a link to a document on another web site. Each document listing displays a document title and category.

The name of the authorized user who last updated the document, the date that the document was added or last updated, and the file size (internal documents only) are automatically rendered for each listing. Link tracking and logging are also available.



### **View A Document**

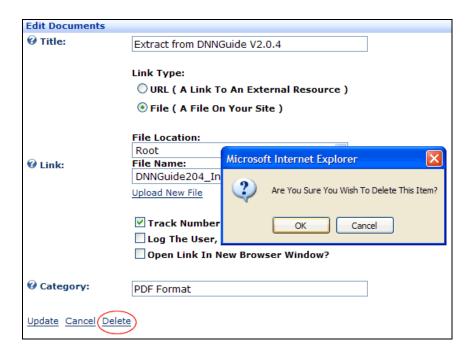
Enables viewing of a listed document.

- 1. Click the linked title of the required document. The document will now be displayed in a new web browser.
- 2. Click the **Back** button in your Internet Browser to return to the page.

## **Download A Document**

Enables downloading of a listed document.

- 1. Click <u>Download</u> located beside the required document.
- 2. *Click* the **Save** button.
- 3. *Navigate* to the location where the file will be saved.
- 4. *Click* the **Save** button.



- 4. At Link Type, select File ( A File On Your Site ).
- 5. At **Link**, perform one of the following:
  - a. If the file has already been uploaded to the Admin > File Manager:
    - At Link / File Location, select the folder within the Admin > File Manager where the file was uploaded.
    - 2. At **Link / File Name**, *select* the file from the drop down list.
  - b. If the file has not been uploaded to the Admin > File Manager:
    - 1. Click Upload New File.
    - 2. At **Link / File Location**, *select* the folder where the file will be uploaded to.
    - 3. At Link / File Name. click Browse.
    - 4. Locate and select the required file.
    - 5. Click Upload Selected File.
- 6. At **Track Number Of Times This Link Is Clicked?** select from these options:
  - 1. Check ✓ the check box track the number of times the link is clicked.
  - 2. *Uncheck* to disable this feature.
- 7. At Log The User, Date, And Time For Every Link Click? select from these options:
  - 0. Check ✓ the check box to add a Link Log to this screen once the record has been updated.
  - 1. *Uncheck* the check box to disable the URL log.
- 8. At Open This Link In New Browser Window? select from these options:
  - 0. *Check* ✓ the check box to open the link in a new web browser window.
  - 1. *Unchecked* the check box to open the link in the existing web browser window.
- 9. At **Category** (optional), *enter* a category for the document.
- 10. Click Update.

## **Edit A Document**

Edits the detail or file for an existing document record.

- 1. *Click* the **Edit** / button beside the document title.
- 2. Edit the document fields as required.
- 3. Click Update.



### **Delete A Document**

Delete a document record.

- 1. *Click* the **Edit** / button beside the document title.
- 2. Click Delete. A dialog box asking 'Are You Sure You Want To Delete This Item?' will be displayed.
- 3. Click  $\overline{\mathbf{OK}}$ .



Adding An External Document

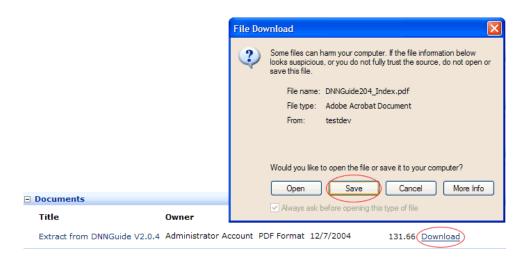


An External Document

# Add An Internal Document (File Link)

Adds a record to a document located on the site.

- 1. Add a **Documents** module, or go to an existing **Documents** module.
- 2. Select Add New Document from the Module Menu.
- 3. In the **Title** field, *enter* a title for the document.



### Add An External Document (URL Link)

Add a document which is located on an external site. Note: the Size (Kb) details are not displayed for external documents. These are listed as Unknown.

- 1. Add a **Documents** module, or go to an existing **Documents** module.
- 2. Select **Add New Document** from the module menu.
- 3. In the **Title** field, *enter* a title for the document.
- 4. At Link Type, select URL ( A Link To An External Resource ).
- 5. At **Link**, *perform* one of the following:
  - a. If this is the first time a link has been created to this URL, enter the URL. E.g. http://www.byte.com.au/Portals/0/Documents/Byte\_eSolution\_Overview.pdf; or
  - b. If a link to this URL has been created previously *click* **Select An Existing URL** and select the URL from the drop down list.
- 6. At **Track Number Of Times This Link Is Clicked?** select from these options:
  - 1. *Check* ✓ the check box track the number of times the link is clicked.
  - 2. *Uncheck* to disable this feature.
- 7. At Log The User, Date, And Time For Every Link Click? select from these options:
  - 0. Check ✓ the check box to add a Link Log to this screen once the record has been updated.
  - 1. *Uncheck* the check box to disable the URL log.
- 8. At **Open This Link In New Browser Window?** select from these options:
  - 0. Check ✓ the check box to open the link in a new web browser window.
  - 1. *Unchecked* the check box to open the link in the existing web browser window.
- 9. At **Category** (optional), *enter* a category for the document.
- 10. Click Update.