

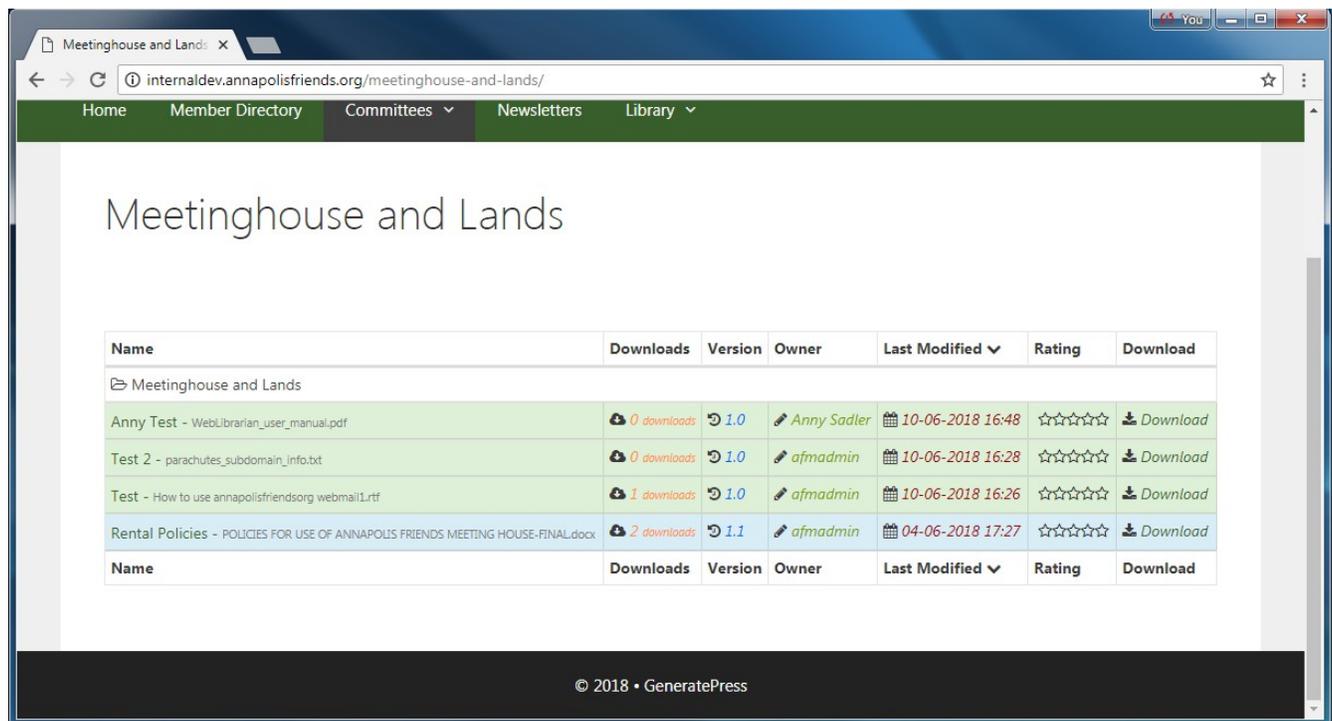
Instructions for uploading and managing documents in the document library.

Overview: Memphis Document Library plugin

Documents are organized by folder and category.

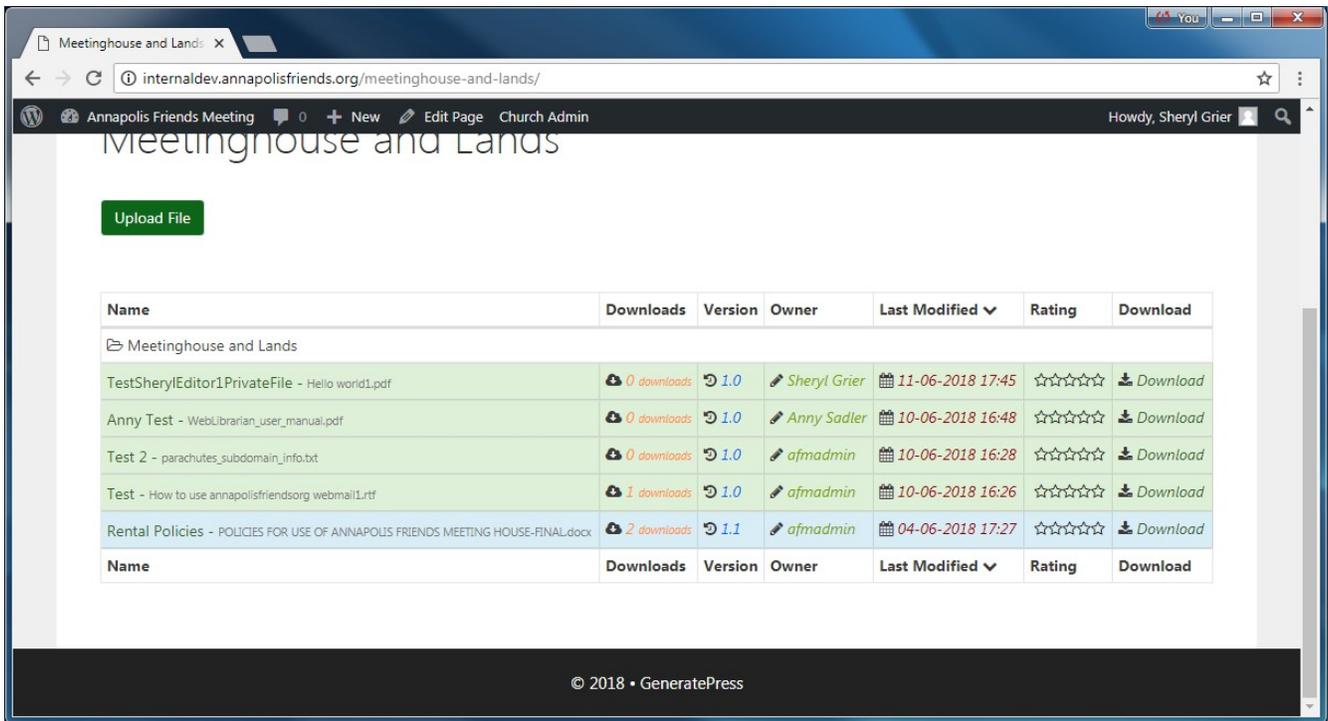
Documents can be publicly accessible – anybody who has access to the page the document is listed on can download the document. Or they can be private – only people with Editor role can see and download the document. Editor users can also upload and manage documents.

Here is how a non-Editor user would see the documents in the Meetinghouse and Lands folder:



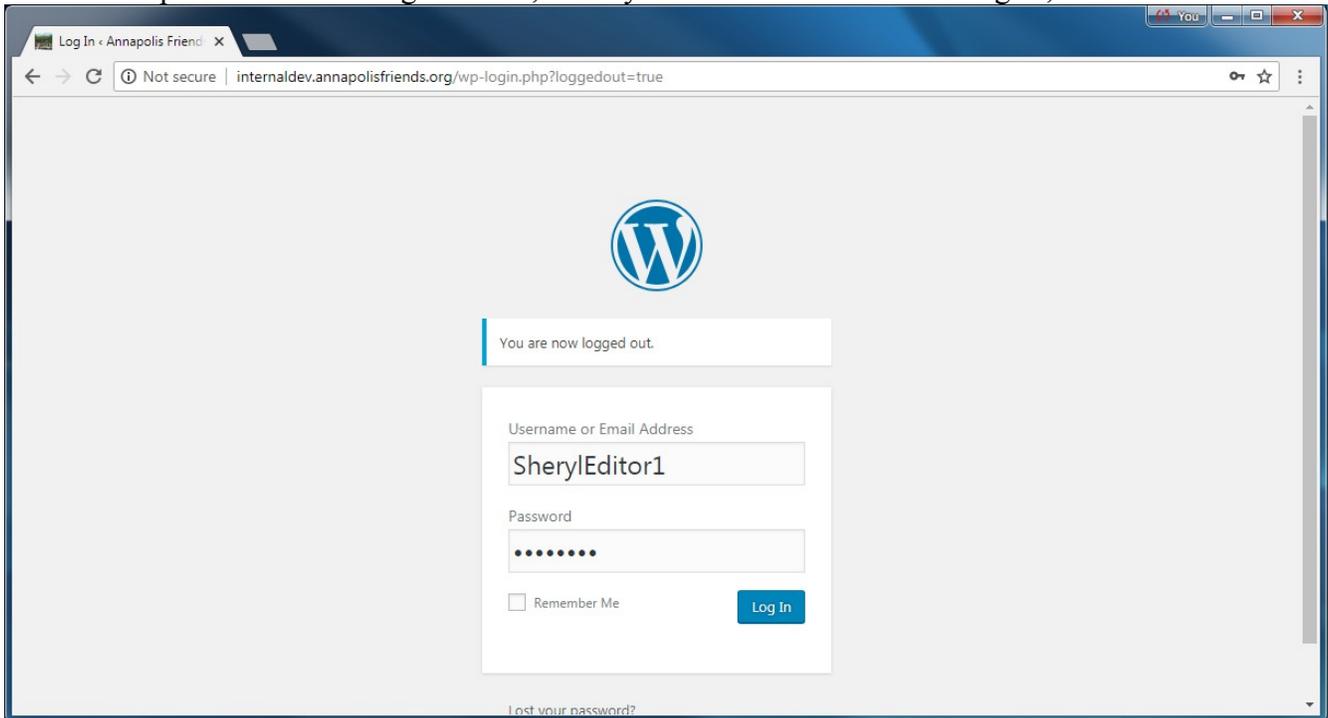
Note: The background of new documents is green, updated documents are blue.

Here's how a user with Editor role would see the same folder. Note that the Editor also has an Upload File button.

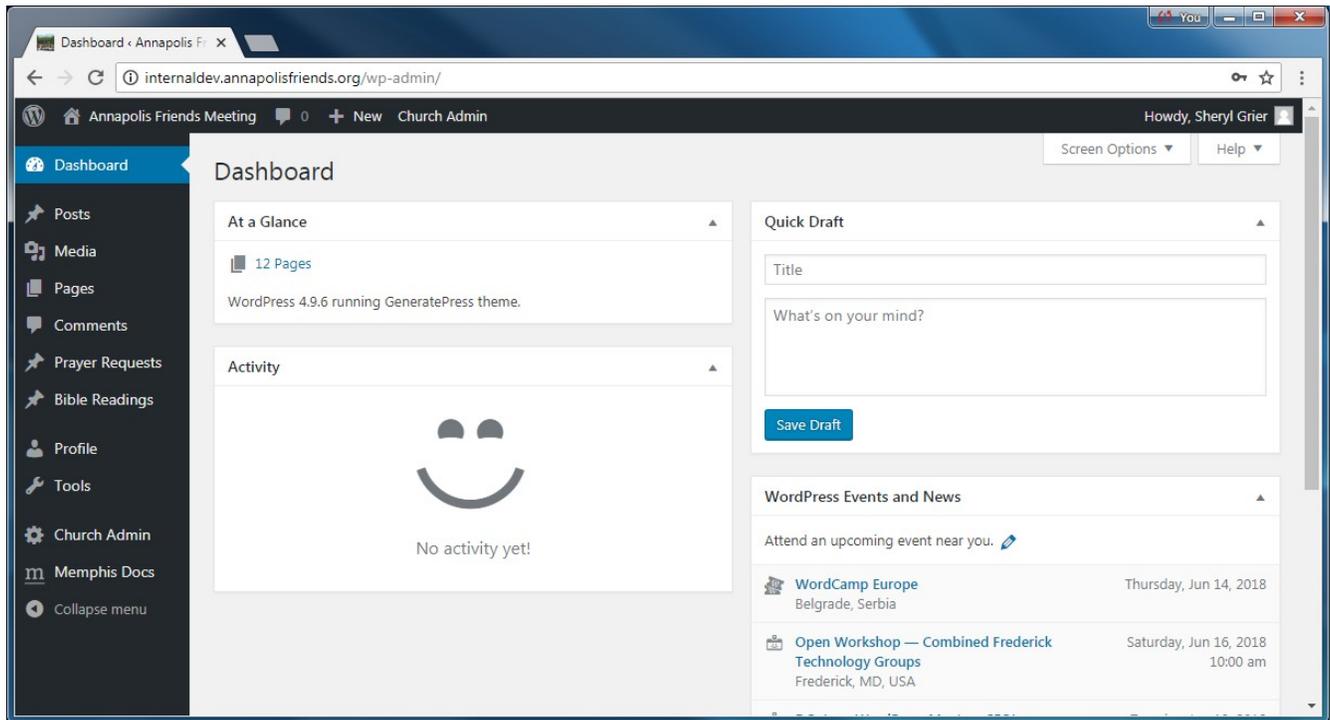


How to upload a file (you must have Editor role to do this)

Point your browser to <http://internal.annapolisfriends.org/wp-admin/>,
You will be presented with a login screen, Enter your credentials and click Log In,



You will be redirected to the Wordpress Dashboard. On the top of the screen, hover over Annapolis Friends Meeting. Visit Site will appear – click on it and you will be taken to the website.



For the moment, I've set up folders for each committee. This may change, but my idea is that each committee can managed its own documents. From the Document Archive dropdown on the top menu, select the committee of your choice. (Not all committees are listed yet – I'm working on it.)

Users with Editor role can upload documents from the front-end via the Upload File button.

- Click on Upload File. A dialog will appear.
- Give the document a title - you may leave this blank, the filename will be displayed in any case.
- Select the file from your hard drive.
- Select the correct folder. If you are on the Meetinghouse and Lands page, then you should select the Meetinghouse and Lands folder. A file may be uploaded into more than one folder, but only one folder can be selected at a time.
- File Status: make this public or private.
- Post Status: you will usually leave this at the default “Published”.
- Uncheck Show Social apps.
- Leave Downloadable by Non Members checked.

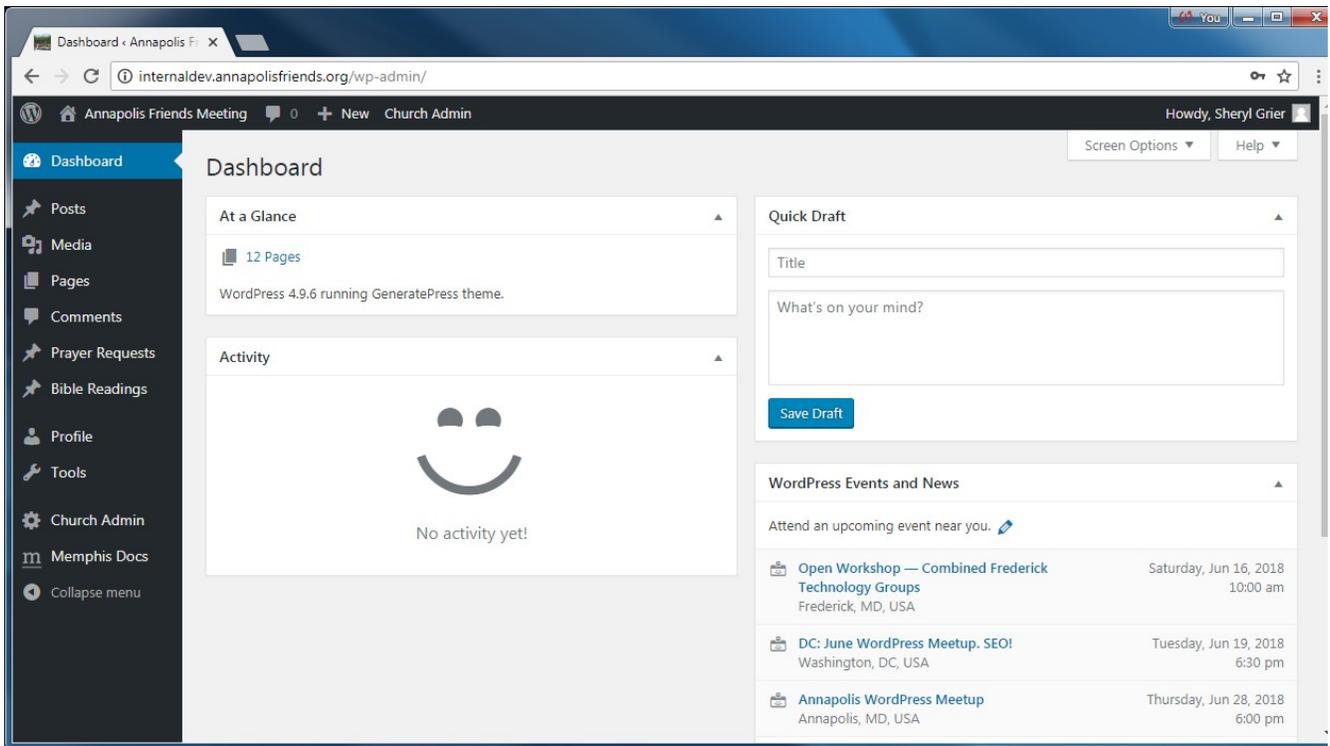
- Contributors: In the contributors box, type “Editor”, then select Editor in the Roles dropdown that will appear. This will make the file downloadable / manageable by any user with Editor role. If the document is “Private” it will be visible only to Editor users.
- Author: optional
- Tags: optional.
- Categories: select the Categories you wish this document to belong to. This will determine what pages it is displayed on. In general, the Category and Folder will be the same.
- Description: optional
- Click Add Document.
- You're done.

Note – there is a currently a bug (I think it's in the software itself). When you click Add Document, you'll be redirected to a page that doesn't exist. You'll get an error. I've submitted a support ticket but here's the workaround in the meantime. Ignore the error; select the document archive page you were on from the Document Archive dropdown menu. It will take you back to the page, and if all went well and the gods smiled upon you, your new document will be displayed in the list.

How to upload a new version of an existing file

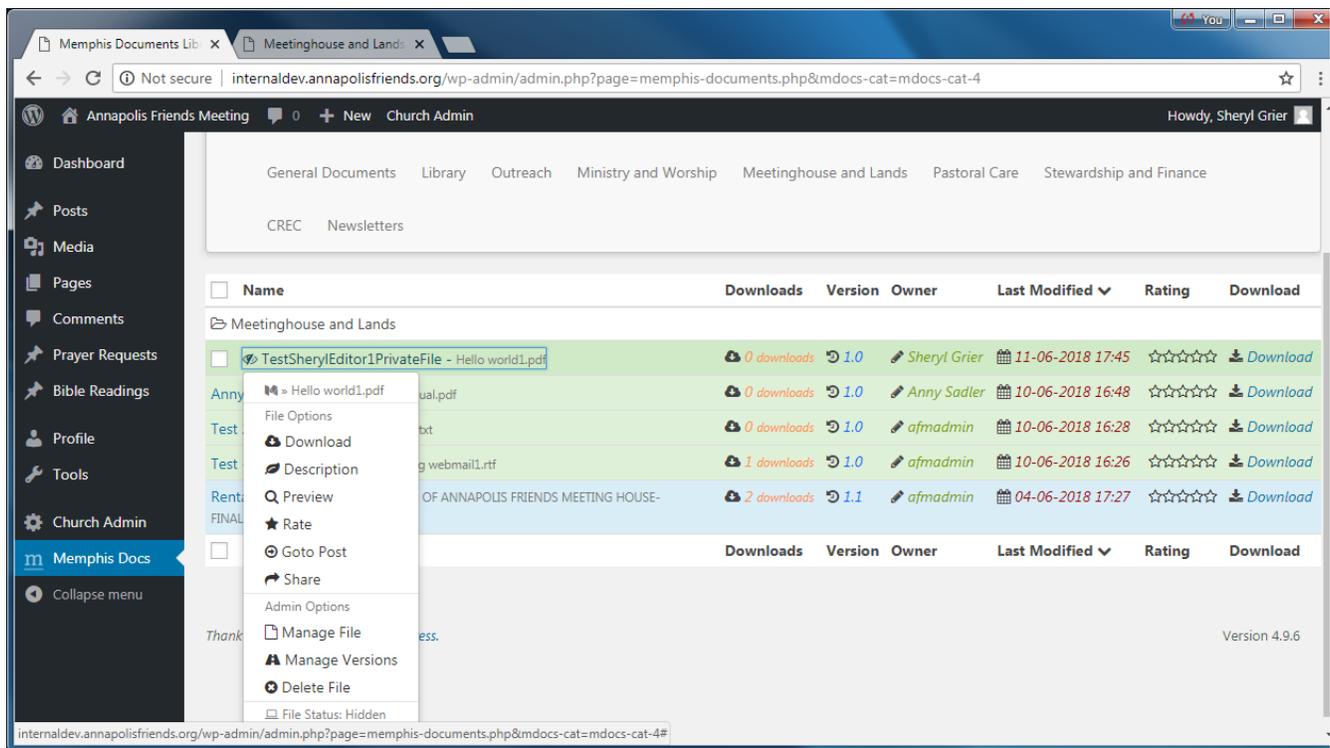
Let's say you have a document already stored in the document library and you want to upload a new version. You do this from the Wordpress Dashboard.

On the Wordpress Dashboard, left hand sidebar, click Memphis Docs:



Select the folder that contains the document you want to manage. (Note: it has to be a document that you uploaded, or you must be a contributor, or you must have role that is a contributor)

Click on the filename. A dropdown will appear. Under Admin Options, click Manage File.



Upload the updated file (file must have the same name). Click Update Document. The version number will automatically be bumped by one minor version (i.e. from 1.0 to 1.1). You can also manually update the version, say if you want to go from version 1.0 to 2.0.

Deleting files

Yes, this is possible. Both the owner and contributors to a file have the ability to delete it. Use this power wisely. Better yet, don't use it at all. In extreme circumstances, an incorrectly deleted file can be recovered from backup, but this can be disruptive. And the webmaster will growl at you.

Editing the categories and folders of a file previously uploaded

You have to do this from the dashboard (<https://internal.annapolisfriends.org/wp-admin/>). From the left sidebar, select Memphis Docs. Select the folder you put the document in, click on the file you want to edit. On the drop down menu, under Admin Options, select Manage File. This option will allow you to change the folder and/or add or change the categories. A document can be in more than one category, the category determines which on page(s) the document is listed. For example, a document might be uploaded into the Outreach folder but be assigned Outreach and Pastoral Care categories. That document will be listed on both the Outreach and Pastoral Care document archive pages.