# 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:

	me Member Directory Committees v Newsletters Library v									
Meetinghouse and Lands										
1/10	eetingnou	se and La	nus							
Name Downloads V						Owner	Last Modified V	Rating	Download	
	eetinghouse and Lands			The second second	-	The second second second second			-	
Anny	Test - WebLibrarian_user_manua	l.pdf		C downloads	D 1.0	Anny Sadler	10-06-2018 16:48	<u> </u>	Lownload	
Test 2	2 - parachutes_subdomain_info.txt			<b>O</b> downloads	<b>D</b> 1.0	🖋 afmadmin	10-06-2018 16:28	****	<b>▲</b> Download	
Test -	- How to use annapolisfriendsorg w	vebmail1.rtf		▲ 1 downloads	<b>D</b> 1.0	🖋 afmadmin	to-06-2018 16:26	****	🕹 Download	
Renta	al Policies - Policies for use of	F ANNAPOLIS FRIENDS MEETING	HOUSE-FINAL.docx	<b>a</b> 2 downloads	<b>D</b> 1.1	🖋 afmadmin	04-06-2018 17:27	****	🛓 Download	
Name	e			Downloads	Version	Owner	Last Modified 🗸	Rating	Download	

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.

Meetin	nghouse and Lands X						
→ C	① internaldev.annapolisfriends.org/meetinghouse-and-lands/						
<i>6</i> 3 A	nnapolis Friends Meeting $\mathbf{P}$ 0 + New $\mathscr{O}$ Edit Page Church Admin					1	Howdy, Sheryl Grier 📃
	Name	Downloads	Version	Owner	Last Modified 🗸	Rating	Download
	C Meetinghouse and Lands		010	A (1 ) ( ) (	99 11 0C 0010 17 45		+ Download
	IestSheryIEditor1PrivateFile - Hello world1.pdf Anny Test - WebLibrarian_user_manual.pdf	<ul> <li>O aownioads</li> <li>O downioads</li> </ul>	91.0 91.0	Anny Sadler	<ul><li></li></ul>	202022	Lownload
	Test 2 - parachutes_subdomain_info.txt	O downloads	<b>D</b> 1.0	🖋 afmadmin	10-06-2018 16:28	****	🕹 Download
	Test - How to use annapolisfriendsorg webmail1.rtf	▲ 1 downloads	<b>D</b> 1.0	🖋 afmadmin	<b>10-06-2018 16:26</b>	****	🕹 Download
	Partal Dalisian - pources conjuct of ANNAPOUR PREMISE METTING HOUSE TANA days	2 downloads	D 1.1	🖋 afmadmin	17:27	****	🕹 Download
	Rental Policies - Policies FOR USE OF ANNAPOLIS FRIENDS MEETING HOUSE-FINAL dock						

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

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

😹 Log In « Annapolis Friend 🗙									
$\leftrightarrow$ $\Rightarrow$ C 🛈 Not secure   internaldev.annapolisfriends.org/wp	← → C 💿 Not secure   internaldev.annapolisfriends.org/wp-login.php?loggedout=true								
	You are now logged out.								
	Username or Email Address								
	SherylEditor1								
	Password								
	•••••								
	Remember Me Log In								
	Lost your password?	•							

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.

Dashboard « Annapolis	Fi ×			You X						
$\leftarrow$ $\rightarrow$ C 🛈 internaldev.annapolisfriends.org/wp-admin/										
🚯 者 Annapolis Friends	s Meeting 📮 0 🕂 New Church Admin			Howdy, Sheryl Grier 📃 🔒						
Dashboard	Dashboard			Screen Options   Help						
📌 Posts	At a Glance		Quick Draft							
9) Media	12 Pages		Title							
📕 Pages	WordPress 4.9.6 running GeneratePress theme.		Inte							
Comments			What's on your mind?							
🖈 Prayer Requests	Activity									
📌 Bible Readings										
👗 Profile	••		Save Draft							
🖋 Tools			WestPress Franks and Name							
	$\mathbf{}$		wordPress Events and News							
Church Admin	No activity yet!		Attend an upcoming event near you. 🖉							
<ul> <li><u>m</u> Memphis Docs</li> <li>Collapse menu</li> </ul>			WordCamp Europe Belgrade, Serbia	Thursday, Jun 14, 2018						
			Open Workshop — Combined Frederick Technology Groups Frederick, MD, USA	c Saturday, Jun 16, 2018 10:00 am						
				· · · · · · · · · · · · · · · · · · ·						

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:

Dashboard « Annapolis F	×				
$\epsilon \rightarrow c$ () internald	ev.annapolisfriends.org/wp-admin/		ም 🕁 🗄		
🚯 者 Annapolis Friends	Meeting 🏓 0 🕂 New Church Admin		Howdy, Sheryl Grier 📃		
Dashboard	Dashboard		Screen Options 🔻 Help 🔻		
📌 Posts	At a Glance	Quick Draft	*		
93 Media	12 Pages	Title			
📕 Pages	WordPress 4.9.6 running GeneratePress theme.				
Comments		What's on your mind?			
📌 Prayer Requests	Activity				
📌 Bible Readings					
💄 Profile	••	Save Draft			
🖋 Tools	$\smile$	WordPress Events and News			
🔅 Church Admin	No activity yet!	Attend an upcoming event near you. 🖉			
m Memphis Docs		Open Workshop — Combined Frederick	Saturday, Jun 16, 2018		
Collapse menu		Technology Groups Frederick, MD, USA	10:00 am		
		DC: June WordPress Meetup. SEO! Washington, DC, USA	Tuesday, Jun 19, 2018 6:30 pm		
		Annapolis WordPress Meetup Annapolis, MD, USA	Thursday, Jun 28, 2018 6:00 pm		

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.

	ງ Memphis Documents Lib	×	) Meetinghouse and Lands							<u>45</u> You	
←	→ C 🛈 Not secu	ire   int	ernaldev.annapolisfriends	org/wp-admin/admin.p	hp?page=memphis-do	ocuments.php&	mdocs-ca	t=mdocs-cat-4			☆ :
🚯 📸 Annapolis Friends Meeting 📮 0 🕂 New Church Admin Howdy, Sheryl Grier											Sheryl Grier 📃
8	Dashboard		General Documents	Library Outreach	Ministry and Worship	Meetinghou	use and La	nds Pastoral	Care Stewardship a	nd Finance	
*	Posts		CDEC N. L.V.								
91	Media		CREC Newsletters								
	Pages		lawa			Developede	Version	Owner	Last Madified to	Pating	Download
	Comments		vame			Downloads	version	Owner		Kating	Download
			eetinghouse and Lands			• •					
	Prayer Requests		TestSherylEditor1Private	File - Hello world1.pdf		O downloads	D 1.0	Sheryl Grier	11-06-2018 17:45	ជាជាជាជាជ	Lownload
*	Bible Readings	Anny	📢 » Hello world1.pdf	ual.pdf		O downloads	Э <u>1.0</u>	🖋 Anny Sadler	🛗 10-06-2018 16:48	ኇ፞፞ፚኯኯኯ	📥 Download
		Test	File Options	bxt		O downloads	<b>D</b> 1.0	🖋 afmadmin	10-06-2018 16:28	ራስራስራ	🕹 Download
<b>é</b>	Profile	Tost	Download	a wahaa ii1 eff		A 1 downloads	510	🖉 afmadmin	₱ 10-06-2018 16:26	******	♣ Download
ø	Tools	Test	Description	g webmanit.rtr		Car 1 downloads	0 1.0	e annaannar			La Dominioud
	CI	Renta	Q Preview	OF ANNAPOLIS FRIENDS M	EETING HOUSE-	2 downloads	D 1.1	🖋 afmadmin	m 04-06-2018 17:27	ណែណាជា	Lownload
\$	Church Admin		🖈 Rate								
<u>m</u>	Memphis Docs	-	Goto Post			Downloads	Version	Owner	Last Modified V	Rating	Download
0	Collapse menu		A Share								
			Admin Options								
		Thank	Manage File	ess.							Version 4.9.6
			A Manage Versions								
			🛚 Delete File								
inter	paldey appapolisfrior da are	/wp.ad-	File Status: Hidden	documents php8imdare	at-mdocr.cat.4#						
inter	naidev.annapolistriends.org	/wp-adm	in/aumin.prip:page=memphis	-aocuments.pnpotmaocs-ci	at=muocs-ca(-4#						

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 (<u>https://internal.annapolisfriends.org/wp-admin/</u>). 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.