

## **Tony - uploading documents and editing text in the intranet**

1. **Go to dashboard** (link to dashboard is on staff homepage, and appears on login page, once logged in)

You are now in the 'backend' of the website.

2. **Click on 'pages -> all pages'** (on the left hand column in the dashboard)

- scroll through the list of website pages until you find 'Policies and Procedures' grouped with all the intranet pages. There are a total of 61 pages in the website, so you will have to scroll to the second page at least - you can also type the name of the page you want into the page search toolbar at the top right of the dashboard

In the intranet site, the Policies and Prodedures page is accessed through the 'Table of Contents' link – it shows all the policies and procedures. The other sections (staff, logistics etc) are listed as separate pages, nested with Policy and Procedures.

**- once you have found the right page, click on the page name, or hover over it, and then 'edit page'**

You are now in the visual editor - it looks similar to an email editor, and the formatting etc is very similar also.

**- how to view page as it appears in website**

The text that you are viewing will look different to how it appears on the website - you can check to see how it looks by clicking 'view page' button, below the page title, and above the formatting icons. This is also handy if you need to edit any other pages, and are not sure if you have the right page.

**to make minor edits to text** - type in corrections, and then click on 'update' (large blue button on the right side). Then view the page, and just come back to the visual editor if you need to keep working. Your changes will not be saved unless you click on 'UPDATE'

**3. To add a new link to a pdf.**

**- format your document correctly**

Firstly make sure your document is saved as a pdf, rather than a word document (in word - click on 'save as' - and choose pdf as the format ) or excel. Also make sure that the name of the document will be identifiable - to save time, the name should be exactly as you want it to appear in the link. If the file is over 64mb, try to divide it into smaller files and name them appropriately - eg part one, part two etc .

**- choose where you want the link to appear**

- find the place in the page where you you want to place the link and click so your cursor is in the right spot - if you want a new bullet point then click at the end of the preceding line, and a new line will appear
- go 'upload/insert' just above the formatting toolbar (bold italic etc) and and hover over the four icons next to 'upload/insert' until you get to the 'add media'

icon (it's a star shaped icon ). The other icons are for uploading image, video and mp3's (you'll see this as you hover over them)

- click on the 'add media' icon and then choose 'from computer', browse to find your file, click on it to upload it.

- **once uploaded**, it will show you the file title (you can change it if you want,) description( if you want you can enter more info) and it will show you the url - address of the file. Once you are happy with title etc, click 'Insert into post' , then 'save all changes' (just below 'insert into post), and close the window to come back to the visual editor.

Your link should appear where you placed your cursor - you can still cut and paste it and move it around if you need to. You can change the link title, the file name will not change

**CLICK ' UPDATE' before leaving the page!!!**

Your document has now been added to the media library, and you can go back and change the title or delete it from the media library, by clicking on 'media - library' and searching it (most recently added docs appear first). You can delete documents in the media library by finding them and clicking on 'delete'.

**Check that it has worked** - after updating - click on 'view page' and click on the link you just added. The document you attached should open up in a new window.

Note – if you have changed something in Policies and Procedures in the staff, logistics or client sections, you will have to also copy and paste that change into the staff, logistics or client sections. You can copy a link, and add it to another page as you would copy /paste in a word document. Just remember to UPDATE after you have pasted!

### **Other functions**

- **deleting a link** - highlight the link or any content you want to delete, delete it and then UPDATE
- **to make minor edits to text** - type in corrections, and then click on 'update' (large blue button on the right side). Then view the page, and just come back to the visual editor if you need to keep working.
- Your changes will not be saved unless you click on 'UPDATE'!

### **Trouble shooting**

- file won't upload - check file format, and size of file.
- link didn't appear after uploading - make sure you click exactly where you want the file to appear. make sure you click on 'insert into post' after uploading into media library