

Document Manager

- View folder structure
- Dynamically search (search as you type) or search by tag for a previously uploaded document folder or file
- Create a new document folder and Upload new document(s)
- Move files to other folders
- Copy document link
- Select the option to edit or delete each document (not applicable for shared documents)

Replacing an existing document in the Document Editor

When updating documents that don't need to be kept in archive, use the Replace Document option so that all instances of the document are updated. To use replace document, you must use the same file type as the original, eg .pdf, .docx, etc

1. Open the Document Manager
2. Scroll through/search for the document you are looking to update/replace
3. Click the pencil icon between the 'copy link' and delete options
4. Click 'Replace Document' in the top right corner
5. Upload a new document and click 'Back'.
6. Hit 'Submit'.

There is no reverse switch here, so make sure you have both files on hand before you test this out

Using a Document Link

In a Rich Text Editor/WYSIWYG Template

Applicable in the Page, News and Event Editors

1. 'Add Page/News/Event' or open an existing Rich Text Editor page/news/event
2. click on 'Add Document or Folder Link' in the top right.
3. Pick the folder/file from the documents manager and hit 'Copy to Clipboard' and close the Document Gallery window. (If you have not already added the document you can upload it directly on the right side of this page and then copy the link once it has been uploaded.)
4. Create a hyperlink to your file in the text editor by highlighting text, choosing the link icon in the toolbar, and pasting the URL. You have the option to open the file in a new tab (recommended).

Applicable in the News and Event Editors

- You have the option to use the 'Alternate Route' to add a link to a document/folder, so a News item or Event can take someone directly to the PDF without it being linked in the text. Simply open the Documents Manager in a new browser tab, pick the folder/file and hit 'Copy to Clipboard' and paste into the News/Event 'External Route' (be sure to check the 'Alternate Route' option).

In a DCT Template

Applicable in the Page Editor

(as DCT templates are completely customizable, these options may not be available in your template - please reach out to support@imagineeverything if you would like DCT sections added)

1. Open the Document Manager in browser tab #1
2. In a new browser tab #2, open the Page Manager
3. 'Add Page' or open an existing DCT page (template sometimes labeled 'Most Popular Template')
4. Choose the DCT section which you want to add your document link to.

Most common would be:

- Button in 'Content Sections'
 - Link in 'Links with Icon'
 - Link in 'Content Boxes'
 - Link in 'Simple Text + Links'
5. In browser tab #1, pick the folder/file from the Documents Manager and click 'Copy to Clipboard'.
(If you have not already added the document you can upload it directly on this page by clicking on 'Add Document' in the top right and then copying the link once it has been uploaded.)
 6. Back in browser tab #2, in the section we are adding the link, paste the copied link in the Button URL or Link/Link URL, add your Button Text or Link Label and hit 'Add/Update' -> 'Save' -> 'Publish'
 7. OR some users may have a Document Link section, where you can click on 'Link to a folder or document' and you don't need an additional browser tab open.
 8. Pick the folder/file from the documents manager (If you have not already added the document you can upload it directly on the right side of this page.)
 9. See the comparison between the different section formats [here](#). Ignore the styling as this can be different from site to site, but focus on the different ways in which you can link to a document in a DCT page.
 10. Remember to hit 'Save' on each section you have edited, and 'Publish' the page.

Applicable in the Alert Editor

- You have the option to use the 'Optional: Learn More route' to add a link to a document/folder, see steps 5 & 6 above.