

## **Loading Documents** **8-11-2022**

### 1. In MS Word:

Make sure the filename you give to save the document has no spaces or punctuation other than dashes. (WordPress will change all punctuation, including spaces, to dashes, which may cause confusion).

If the file applies to an artist, it should begin with the artist's last name followed by a dash followed by a short title for the article without spacing. This might look like Miyajima-BioStoryConcepts.

Otherwise, the filename should contain each menu level you traverse to get to the document, separated by dashes and no punctuation or spaces within each menu level. For example,  
Business-BoardRoom-Minutes-2020-September

A more complex filename might look like  
Art-Collections-Antiquities-GreekAndRoman-GreekStylisticPeriods

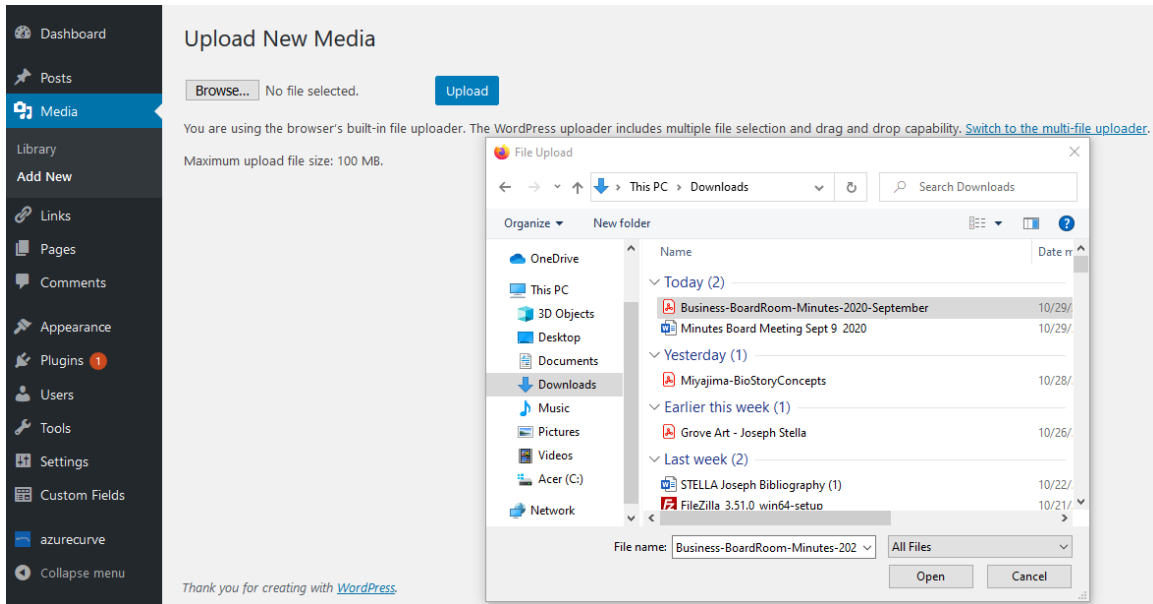
Whenever a full date is included, it should be formatted as YYYY-MM-DD so that the list of filenames will sort in date order.

Save it as a Word.doc file, not a Word.docx (so people with Apple devices can open it). When the document is final, save it as a PDF to load into WordPress.

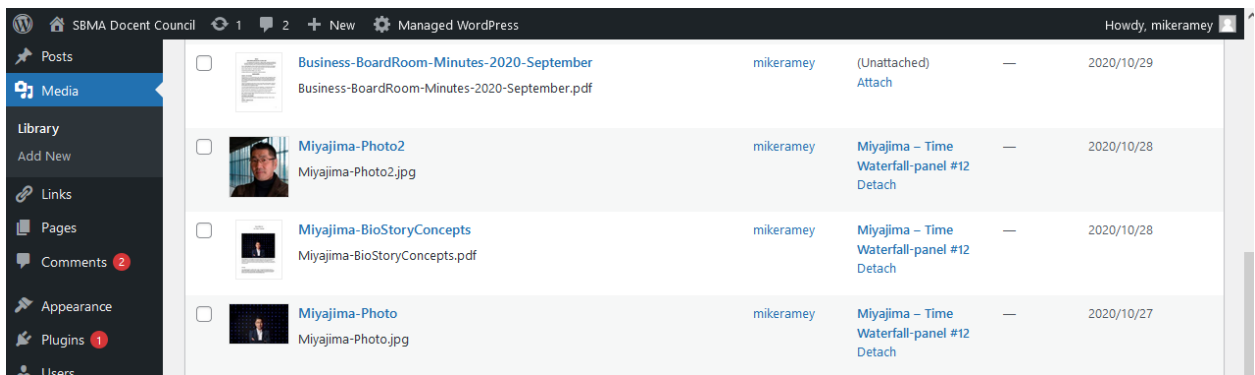
PDF (Portable Document Format) is a file format that provides an electronic image of text or text and graphics that looks like a printed document and can be viewed, printed, and electronically transmitted. PDF files are universal and will display on all hardware and software platforms. DOC and DOCX files are not. They have to first open MS Word on the local device, which requires answering a series of prompts. Moreover, not all docents have MS Word so they would be completely out of luck.

Bottom line: save or convert all documents to PDF format before uploading.

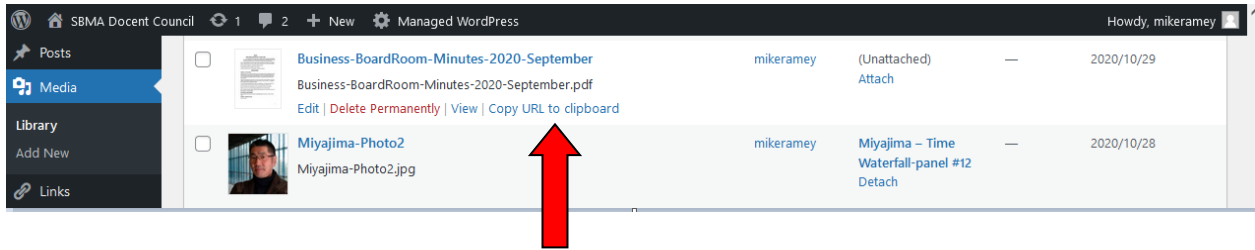
2. In this step you load the document into the Media Library. From the Dashboard, scroll over Media and click **Add New**. Click **Browse** to locate your file. Once selected, click **Upload**.



Your Media Library screen will be displayed with your new file on top:



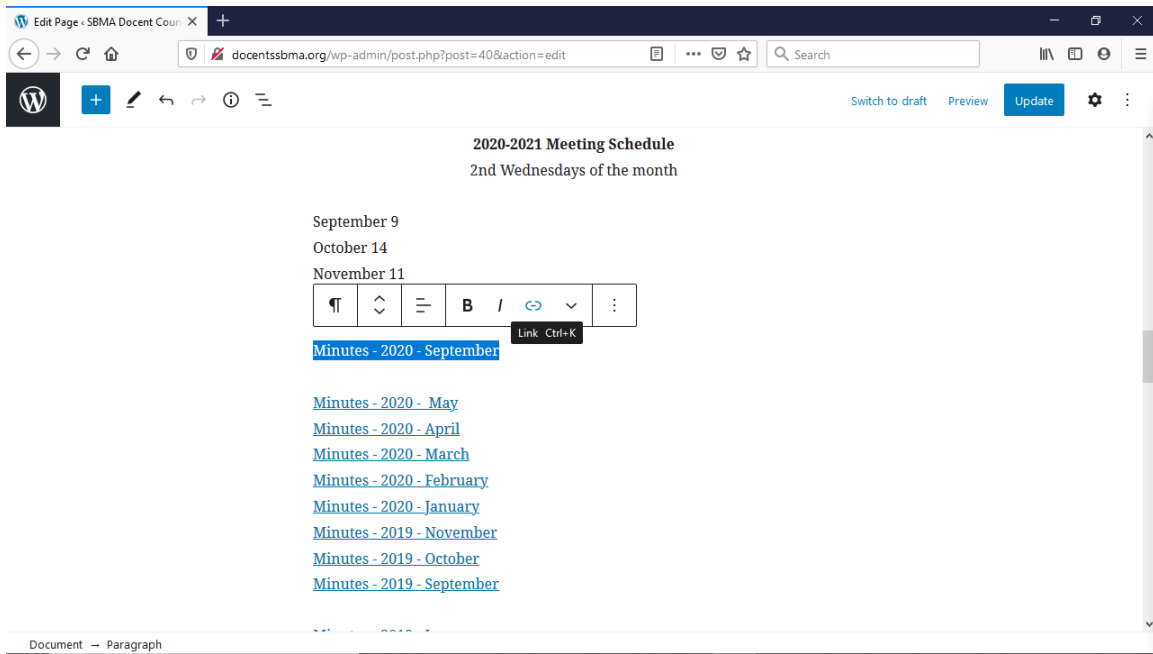
Scroll over the filename area to get action prompts (illustrated on next page) and click **Copy URL to clipboard**:



It will reply “Copied!” when it has done so.

You’re now ready to exit the Media Library and return to SBMA Docet Council to navigate to the screen where you wish to place the document. Be careful not to copy anything else into your clipboard until the next step is completed.

3. Click *Edit* on the left or *Edit Page* on the top to get into edit mode and scroll to where your document will go.



CAUTION: In the Gutenberg editor the *Enter* key can not be used for line spacing. Instead, it inserts a new block, which is seldom what you want.

Use only *Shift Enter* for all line spacing.

Here I moved the cursor to be in front of the “Minutes – 2020 – May” line and pressed *Shift Enter* twice. (In this case I was starting a new year so wanted an empty line after the line I wanted to fill.) That opened up 2 empty lines and placed a toolbar above the empty space. I then pressed the up arrow twice to move the cursor to the top line. I could also have just clicked into the same location.

Next I typed in the text I wanted to display: Minutes – 2020 – September

I highlighted that line and clicked the Link symbol in the toolbar. (Sometimes you have to click twice.) This gave me the following pop-up:

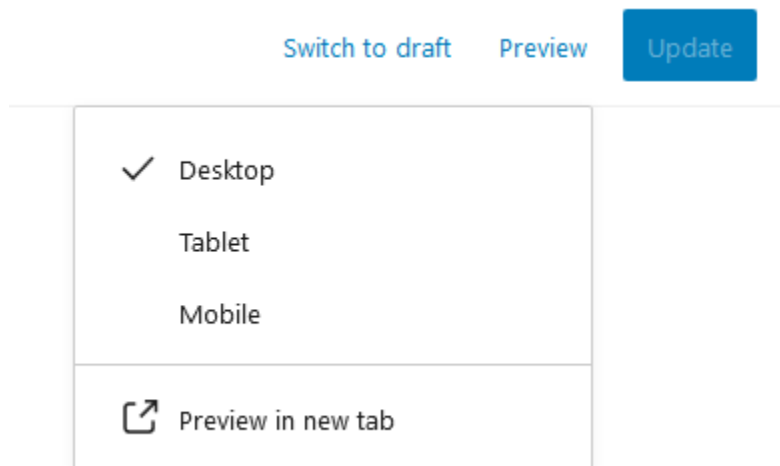


The cursor will be blinking in the data entry box.

Now press **Ctrl V**. This will insert the file URL that you copied from the Media Library.

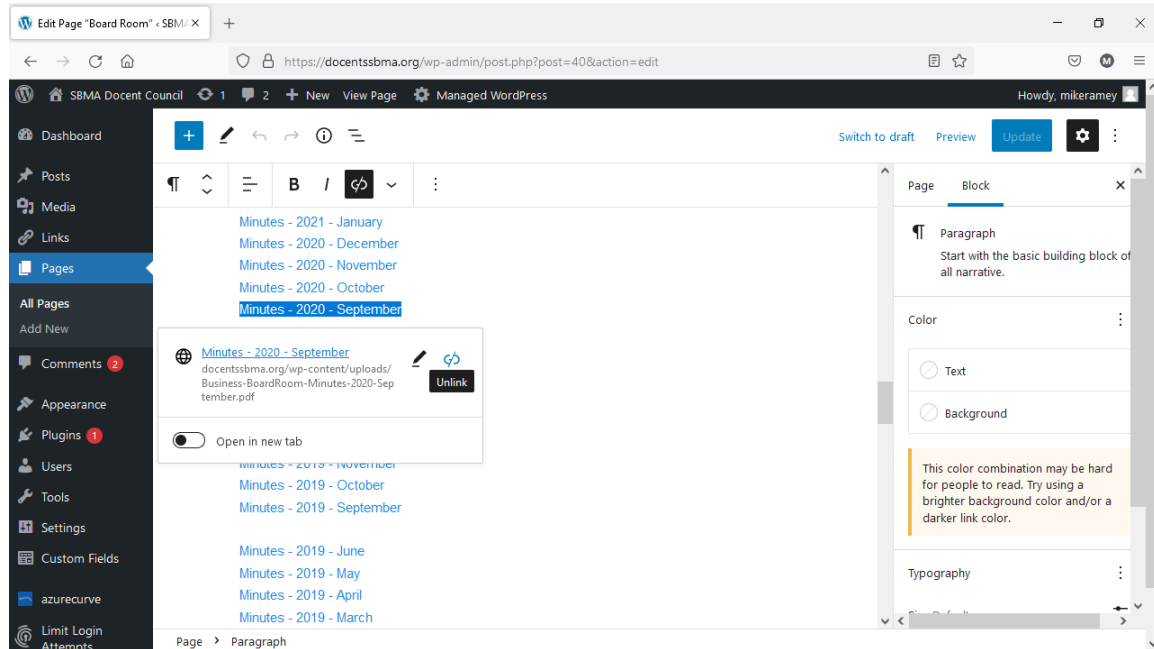
Next click the ↵ symbol to link your text to the document URL.

The text will change to blue and you can test your work by clicking **Preview**. Then, in the pop-up, **Preview in new tab**. If it all succeeded, close the preview window and click **Update** to finish the task.



In certain circumstances the Preview function does not show the update. Close the preview window and try again. If it still doesn't function properly, go ahead and update anyway. Then click **View Update** in the lower left area to make sure the update succeeded. If it isn't right, edit some more.

4. To unlink an existing link, just highlight the link to be removed and click the link symbol at the top of the post. A pop-up will appear nearby, usually below.



Click the unlink symbol. The pop-up will disappear and the highlighted text will turn from blue back to black.



If you wish to link said text to a new document, just highlight the black text and start over. Otherwise just delete the old text.

Note that this only deletes the link, not the document itself. In most cases, preserving the document in the media library is advisable. You may want to come back to it later either to repurpose it in another location or for review purposes. For example, as of this writing we are on the sixth edition of the bylaws.

When updating an existing document, it is best to append an edition number to each successive update rather than invent a new filename altogether, for example:

- Business-Bylaws
- Business-Bylaws-2
- Business-Bylaws-3

**Beware: Your original filename may remain in WordPress memory, so trying to update with the same filename may result in the update not happening when you think it has.**