

# Documents

Last Modified on 09/12/2022 12:10 pm PDT


There may be times when you want to have a document on the website that you can link to from webpages or other materials. Though it is common to use documents in your everyday work, it is important to be conservative about your use of documents on the website. Most information is better published in the format of web content, rather than external documents such as [PDFs](#), [Word documents](#), or [PowerPoint](#) files.

In certain instances, however, uploading a document to the website may be advantageous for the nuances within your workflow or the intended usage for end users. Once you have identified a clear and specific need for a document on your page, you are ready to learn how to upload a document and update it for changes.



## Instructional Videos

Watch these 2-minute tutorials for an initial overview of linking to and updating documents, or scroll below to see complete written instructions.

\*Note: Click  icon for best view.

## How to Upload a New Document

### 1. Identify the Need for a Document

Given the known disadvantages of documents on websites, it is worth pausing to ensure that you can justify your need to host a document online. Consider this opportunity to reimagine an old process: make your static document's content more effective by transferring it into a webpage format that can successfully engage your digital-first audience.


For multiple reasons, it is typically best to convert the information from an old document into nicely designed content on a webpage (or multiple webpages) to use moving forward. Reimagining information as web content enhances the following aspects of user experience, as compared to storing it in a document:

- *usability*: web content is more natural to consume on a screen than documents
- *searchability*: web content is easier to parse with search tools (i.e., Google) than documents

- *navigation*: web content offers more robust navigation menus and links than documents
- *accessibility*: web content adapts to tools that help people with disabilities more than documents
- *responsiveness*: web content displays information on different screen sizes better than documents



Though there are many points in favor of web content over documents, there are a few instances when a document is advantageous. If the information in your document meets *one or more* of the following criteria, it may be justifiable to keep in its document format:

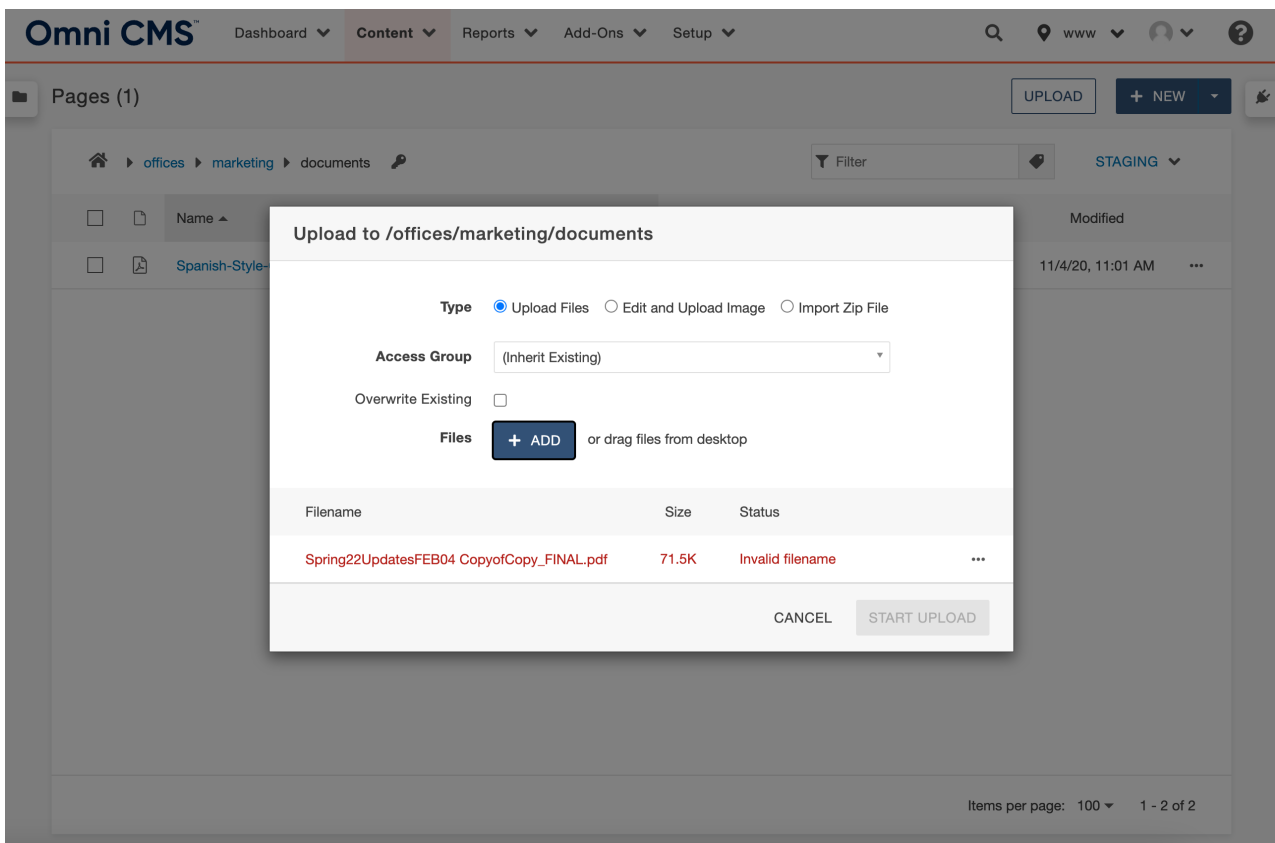
1. The information is intended to be *downloaded and printed* in a specific format by the end user (e.g., formal documents such as CVs, or contracts such as those that require signatures by hand).
2. The information is designed to be *downloaded and edited/interacted with* by the end user (e.g., presentation slides, fillable spreadsheets and text documents, or visual assets).
3. The information is *frequently updated in its original document format*, and it would not be realistic to manually convert into a webpage on a regular basis (e.g., course syllabi or academic planning files).
4. The information is *exceptionally long*, and it would require too much upfront time to manually convert into a webpage, although this could be a good future project (e.g., handbooks, manuals, or brochures).

 **PRO TIP:** Calendars, charts, or applications that currently exist in the format of a document are usually best provided as web content. Consider the [Snippets](#) for \_\_\_\_\_ or \_\_\_\_\_ to reimagine a calendar or chart, or request an online form via [Web Support](#) to replace a PDF application.

## 2. Add the Document

If your need for a document meets the necessary criteria to proceed, the next step is to upload the document to the CalLutheran.edu website.

While you are [Editing a Page](#), click the [◀ Back to Pages](#) link in the upper left corner of the page. Then, navigate to the root menu item for your section of the website and select the \_\_\_\_\_ folder. Click the  button in the upper right corner of the page to open the \_\_\_\_\_ window and then click the  button to add the file from your computer, as seen in the example below.



😊 EXTRA INSIGHT: A document can be uploaded anywhere on the website, but it is encouraged to upload it to the `/offices/marketing/documents` folder in your section of the website. This keeps an organized file system.

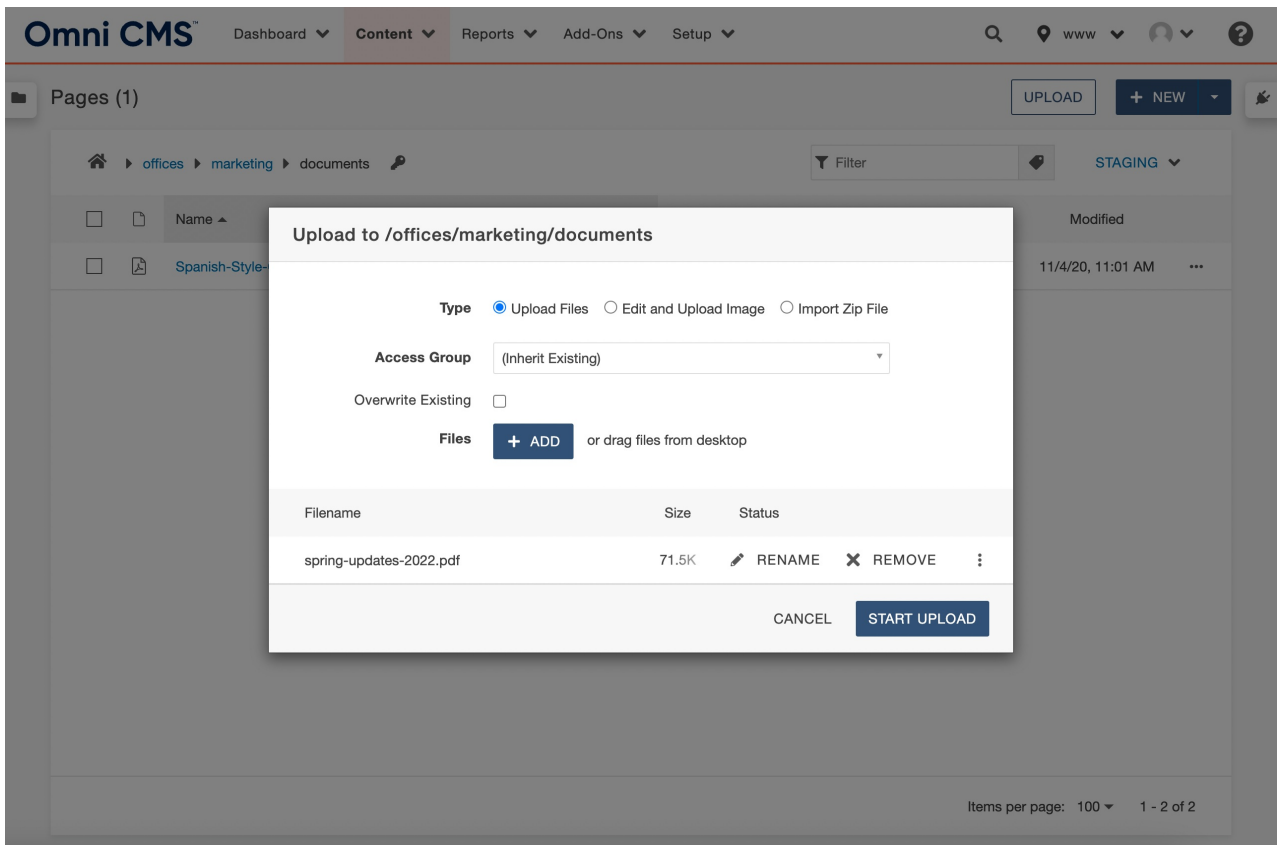
### 3. Name the Document

Because your document will be viewable to your audience on the CalLutheran.edu website, it is important to name your document in a clean and logical manner. As seen in the example above, Omni CMS indicates that a filename is invalid if it contains spaces, but there are other recommended conventions as well.

Here are the recommended conventions when naming a document:

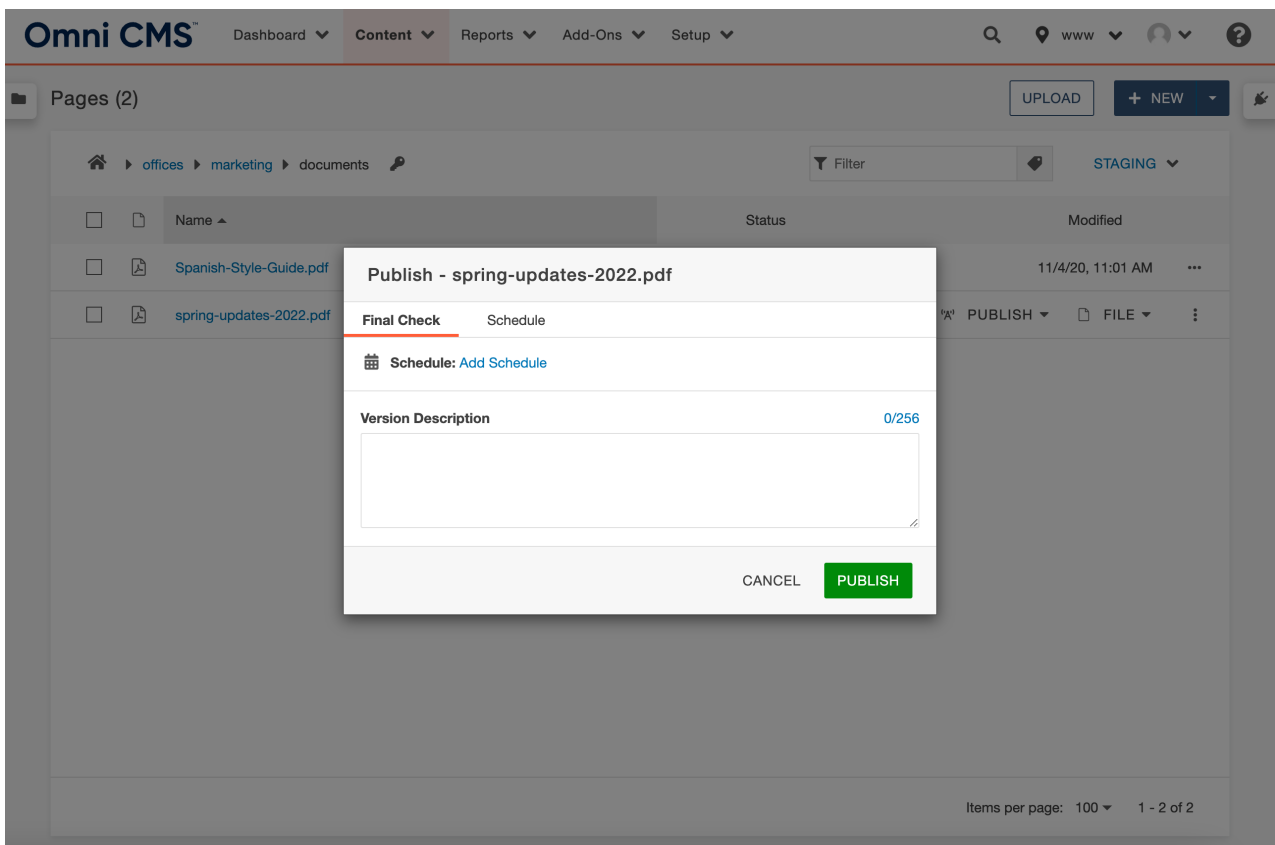
- Capitalize in *lowercase* for all letters and words.
- Use *simple words* that are easy to understand.
- Avoid *jargon, abbreviations, and acronyms* that could confuse your audience.
- Omit *unnecessary phrases*, such as "copy of", "approved", or "final".
- Use *dashes* instead of spaces or underscores.
- Keep the *file extension*, such as .PDF, .DOC, or .XLS.

If needed, you can rename your document in the `Details` window by clicking the `⋮` icon and choosing the `✎ RENAME` option to enter a new name. Then, click the `START UPLOAD` button, as seen with the newly re-named document in the example below.



#### 4. Publish the Document

After you have uploaded your document, click the **...** icon and select the **PUBLISH** button to open the **PUBLISH** window. Then, click the **PUBLISH** button to publish the document on the CalLutheran.edu website, as seen in the example below.

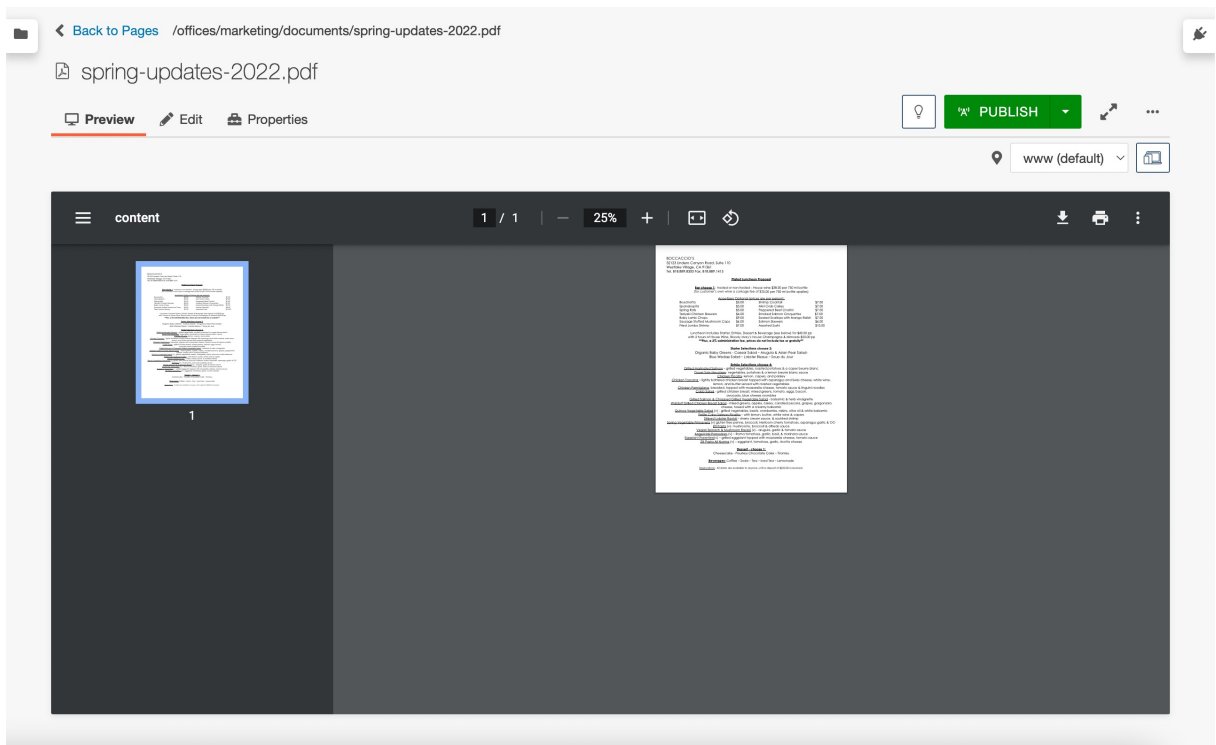







## 5. Link to the Document

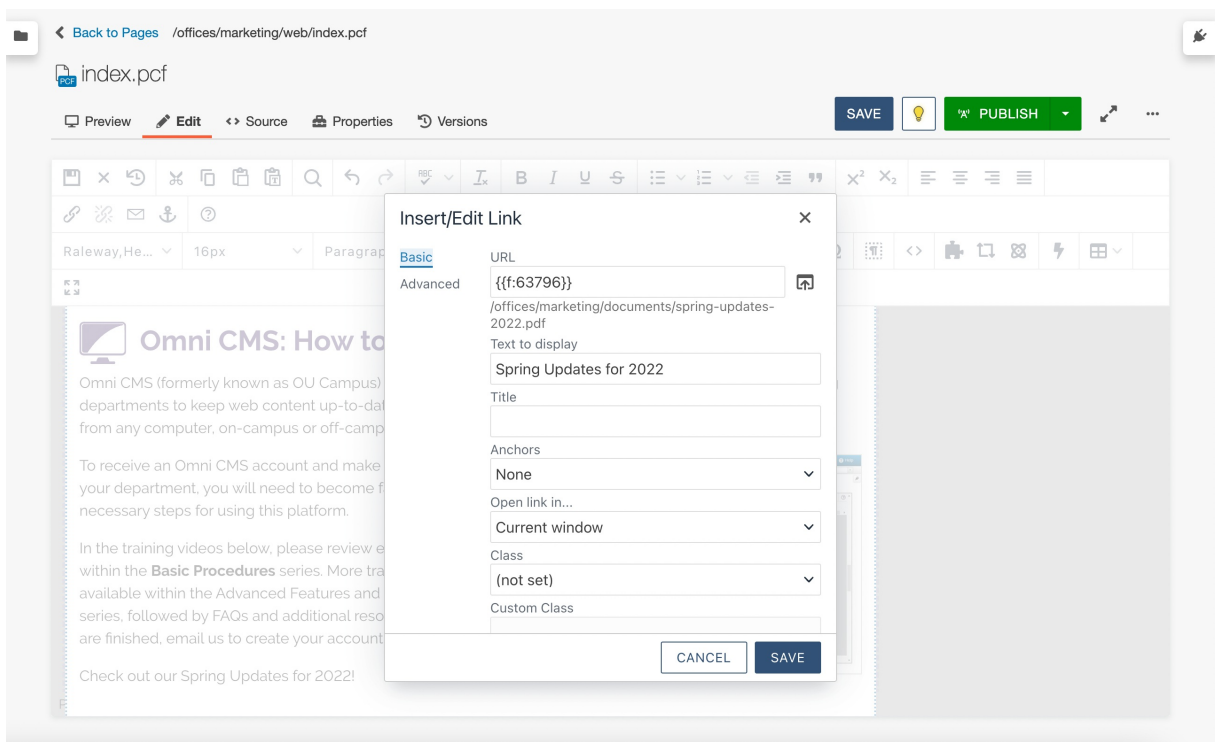
Once you receive the   banner in the bottom left corner, your document is viewable to the public but is not yet discoverable. If you would like your document to be discoverable, you will need to link to it from somewhere else.

There are two ways to link to the document:

- If you would like to link to the document from somewhere outside of the CalLutheran.edu website (e.g., email campaign, social media post, presentation slides), you can obtain the link by clicking on the document in Omni CMS to copy and paste the URL from the upper left corner of the screen (and precede it with `https://callutheran.edu/`), as seen in the example below.



- If you would like to link to the document from somewhere inside of the CallLutheran.edu website (e.g., a page in your department's section of the website), the best way to do this is to navigate to it from the file browsing system within Omni CMS. While you are **Editing a Page** and creating **Hyperlinks**, select the text that you want to hyperlink and click the  tool in the editor toolbar to open the  window. Then, click the  icon to browse to your file that is stored in the  folder within your section of the website. Click the **INSERT** button to insert the document. This generates a unique ID number in the format of  and allows you to click the **SAVE** button to create a hyperlink, as seen in the example below.

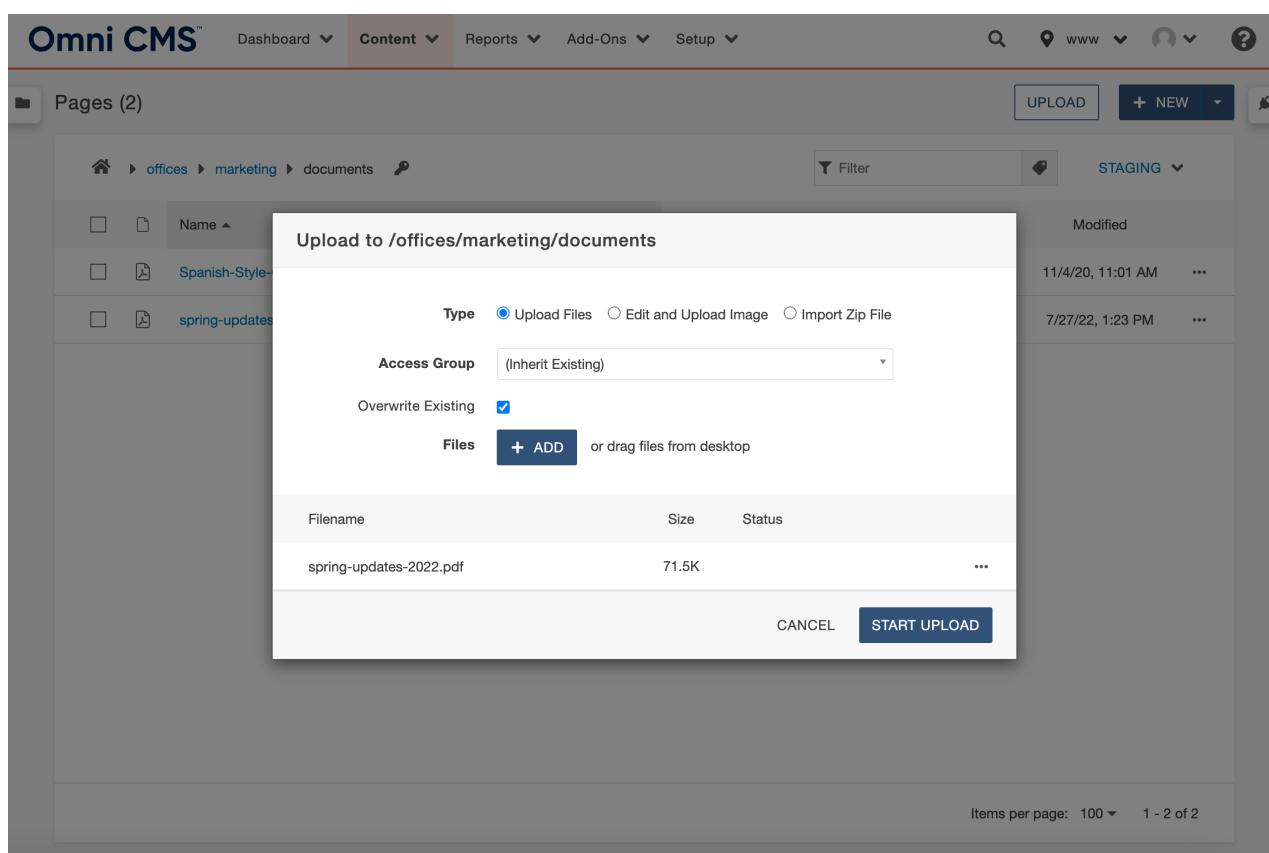


# How to Update an Existing Document

In some instances, you may want to update a document that was previously uploaded to the CalLutheran.edu website. This allows you to refresh the document with the latest version of the document on your computer, without changing the URL or document name on the website. The steps to do this are a simplified version of the steps required to upload a new document.

## 1. Add the Document

While you are [Editing a Page](#), click the [Back to Pages](#) link in the upper left corner of the page. Then, navigate to the root menu item for your section of the website and select the [documents](#) folder. Click the [UPLOAD](#) button in the upper right corner of the page to open the [Upload](#) window and click the [+ ADD](#) button to add the file from your computer, as seen in the example below. Then, tick the [Overwrite Existing](#) checkbox and click the [START UPLOAD](#) button, as seen in the example below.



## 2. Receive Confirmation Banner

After uploading, look for a banner in the bottom left corner of the screen that reads [Document Updated](#). This confirms that the online document has been overwritten with the new document that you uploaded from your computer.

All of the existing hyperlinks to the document will now automatically display the document in its new version.