



mamboSchools Tutorial

DocMan (v3)/Document Library Series (jv3.x)

3: Updating an Existing PDF

This web application print manual will educate and introduce web managers to the document library (DocMan) component within your mamboSchools™ site.

The document library component allows you to upload .doc, .zip, .pdf, etc. to your website. These documents are organized in categories and viewed/downloaded by your school community.

Updating a Document File

The screenshot shows the mamboSchools interface. The top navigation bar includes menus: System, Users, Menus, Content, Components, Extensions, and Help. The left sidebar has a 'Documents' section (1) with sub-items: Categories, Tags, Files, Users, and Settings. Below this is a 'CATEGORIES' section with 'All Categories' (2b) and subcategories: Athletics (1), General Information (1), and Services (0). The 'Athletics (1)' category is selected (2a). The main area displays a table of documents. The table has columns: Status, Owner, Tags, Group, Access, Date, Title, Status, Access, Owner, Date, Category, and a download icon. The table lists five documents: 'Weekly Reader - March 29, 1965', 'Yearly School Calendar', 'Physical Form', 'Current Breakfast Menu', and 'Current Lunch Menu'. The 'Current Lunch Menu' entry is highlighted (3). A search bar at the top right of the table is labeled (2c).

Figure 1

As the year progresses, you may wish to update the PDF file linked to a previously added document entry or change the title of your entry.

For example, your school may publish monthly PDF menus. We need to update the PDF attached to the document entry. In this example, we will locate and update the high school menu document entry.

Figure 1

1. Access the DocMan Component. Select the 'Component' menu > DocMan. By default, you will be dropped into the document section of DocMan.

The documents area lists all the entries within the Document Library by title. There are three ways to locate the document entry with the PDF you want to update.

2a. Locate the document entry by manually scrolling/reviewing the entries.

or

2b. Use the category filter area at left. Click on a category title or subcategory. Clicking on the title displays entries assigned to the category.

or

2c. **BEST METHOD.** Type part of the entry name in the search field. Press ENTER/RETURN. The entries will be filtered by the term. NOTE: Click the 'x' at the end of the search field to clear the search term.

3. Whatever way you select above to locate your entry, you must click the entry title to update it. In our example, we are clicking the title 'Current Lunch Menu'.

Updating a Document File (cont.)

The screenshot shows the MamboSchools document editor interface. At the top, there is a navigation bar with links: System, Users, Menus, Content, Components, Extensions, and Help. Below this is a toolbar with buttons: Save, Save & Close, Save & New, and Cancel. A circled '5.' is placed over the 'Save & Close' button.

The main content area is divided into two sections. The left section is titled 'Current Lunch Menu' and contains an 'Alias' field with the value 'november-lunch-menu'. Below this is the 'File' section, which has a circled '4b.' and an 'Update' button. The file name is 'November Menu.pdf, 476 kb' and the description is 'Drop another file to update'. A circled '4a.' is placed over the 'Update' button. Below the 'File' section is a 'Category' dropdown menu with the value '- Food Services (Lunch Menus)'. At the bottom of the left section is a rich text editor with tabs for 'Source', 'Design', and 'Elements'. The 'Design' tab is active, showing a toolbar with various formatting options.

The right section is titled 'Publishing' and contains several fields and buttons. The 'Status' section has 'Published' and 'Unpublished' buttons. The 'Date' field shows '2016-11-08 16:59:07'. The 'Start publishing on' and 'Stop publishing on' fields are empty. The 'Tags' section has an empty text box. The 'Permissions' section has an 'Access' dropdown with 'Inherit from category', 'Groups', and 'Presets' options. Below this, it says 'This document can be viewed by:' with a list containing 'Public'. The 'Owner' field shows 'Super User'.

Figure 2

Figure 2

After clicking the document entry title, its information appears. Locate the 'File' area.

4. To update your entry with a new PDF:

- Drag a PDF (or other document) from your desktop into the box area. NOTE: The entire area is a drop zone.

or

- Click the 'Update' button. Reminder: The open file dialog box will appear (not shown). Route to your desktop, My Documents, or other folder. Select your saved .pdf, .doc, .zip, .rtf, or .xls file. Click the "Open" button.

Your dropped or selected file will replace the old one in the entry. The new PDF title should appear beside the 'Update' button.

NOTE: Now would be a great time to make adjustments on the title or description. You can also move the entry to a new category by selecting a different category from the dropdown menu below the 'File' area.

5. To finalize the entry, click the 'Save & Close' button.

IMPORTANT: By updating the document entry file, you have automatically updated the document entry and all links that may have been tied to the entry throughout the web site.

In our site, we have linked to the high school menu several times. This single action has now updated all the web site links to the lunch menu PDF file.