

OIT Web Services | CommonSpot Help Guide

Document Manager - Uploading a New Document

<http://www.ohio.edu/web/help/docs/documents/document-manager-upload-document.cfm>

Uploading a document to an existing Category

1. Go to the manage page for the documents – usually in the same directory the documents are listed in and named as manage.cfm. For example if the documents are showing up on <http://www.ohio.edu/trustees/agendas/>, the manage page is [http://www.ohio.edu/trustees/agendas/ **manage.cfm**](http://www.ohio.edu/trustees/agendas/manage.cfm)
2. Click on "Manage Documents"
3. Click on "New Documents & Categories"
4. Select the category you want from the drop down menu (if you want to make a new category, [read here](#))
5. Select the SubCategory, if desired, from the dropdown menu. If you do not wish to create or choose a subcategory, choose 'No Subcategory' from the SubCategory field. (if you want to make a new subcategory, [read here](#))
6. Click on "Browse..." and select the image from your hard drive to upload
7. Once you select the document, select the document type. If no document type exists, or this is a new document type, fill in the information for document type (i.e., PDF, Excel, Text, Presentation, etc.)
8. Add a Document Description. This will become the name of the document that users will click to view the document.
9. Select the "Document Date" by clicking on the calendar.
10. Click on Submit Now and your document will be uploaded.

Adding a new category

1. Click New Documents & Categories
2. In the Category field, choose 'New Category'
3. Provide a name for the Category in the 'Category Name' field
4. Optionally, provide an error message to appear when no documents are in this category.
5. Optionally, provide a document to upload into this new category by clicking the 'Browse' button on the 'Document to Upload' field.
6. Click 'Submit now', and you will be presented with a transaction summary. Click Continue.

Adding a subcategory:

1. Click on "Manage Documents"

2. Click on "New Documents & Categories"
3. Select the category you want from the drop down menu (if you want to make a new category, [read here](#))
4. The SubCategory field will appear. Choose 'New SubCategory'.
5. Provide a name for the SubCategory in the 'SubCategory Name' field
6. Optionally, provide an error message to appear when no documents are in this subcategory.
7. Optionally, provide a document to upload into this new subcategory by clicking the 'Browse' button on the 'Document to Upload' field.
8. Click 'Submit now', and you will be presented with a transaction summary. Click Continue.

Managing Documents in the Document Manager:

- the 'e' icons enable you to edit the category/subcategory/document
- the 'x' icons enable you to delete a category/subcategory/document. If you delete a category/subcategory, all documents under it will be deleted as well. This cannot be undone, so delete carefully!
- The display Option can be changed to one of the following using the 'e': Display All, Academic Year, Calendar Year, Fiscal Year, or Date Range.