

Using WordPress: Uploading Documents for Download

You can either upload your documents directly into the Media Library or while you are editing pages/posts. PDFs are the recommended format for text documents over Word documents (unless you want users to be able to edit them after downloading; usually this is not the case.) Other supported MS Office formats are Excel and PowerPoint.

Tip: As of this writing, the supported document extensions are: pdf, doc, docx, ppt, pptx, pps, ppsx, xls, xlsx, odt, txt.

Tip: If you do decide to upload Word documents instead of PDFs, be mindful of the fact that all of the tracked changes will be present. You may want to make a fresh copy so people cannot see past changes and comments.

Important Information About Copyright

Copyright infringement fines are steep. The same rules for copyrighted images apply to PDFs or other documents – you must have permission to post it. Do NOT assume it is okay to post PDFs of journal articles even if you are an author on the paper; you must check the terms of each journal. Some journals require that you link to their site and do not allow personal distribution of the article, including posting on the Museum's website.

Uploading documents to the Media Library

1. Go to the *Media* menu from the *Dashboard* and choose *Add New*.
2. Click the **Select Files** button to browse for files on your computer, or you can simply drag and drop your file directly onto the screen.

Tip: Place your (Windows) Explorer or (Mac) Finder window near your browser window to make dragging and dropping easier.

3. Click on the document icon to open the *Attachment Details* window. There are three fields you can fill in:

Title: This defaults to the document file name. When you insert a document on the page this is what text is displayed, so it may be more helpful to change it to something more readable/accurate if applicable.

Caption: This field displays on the media attachment page if you choose that option for your document link. This is not a common situation and it can usually be left blank.

Description: This field displays on the media attachment page if you choose that option for your document link. This is not a common situation and it can usually be left blank.

4. Click off of the text fields to save or click the X button to close the window and save your changes.

Inserting or uploading a document while editing a page or post

Documents do not have to be uploaded to the Media Library ahead of time. You can always upload a document while you are editing a page or post.

1. While editing a page or post, position your cursor at the place in your page where you want to insert a link to download your document and click the **Add Media** button above the main editing toolbar.

To upload a new document

2a. Click on the *Upload Files* tab. Follow steps #2 and #3 under the previous section for uploading documents to the Media Library and then continue with step #3 of these instructions below after clicking back to the *Media Library* tab.

To insert an existing document

2b. Click on the document in your library that you want to use.

*Tip: The **Title** that is entered here is what will display as the link text on your page. You can always change that text after you insert it, but it may be easier to change it here instead.*

3. You may also want to set the *Attachment Display Settings* in the lower right side:

Link To: Change this to *Media File* if you would like people to be able to click on a link and download the file right away. (This is the recommended option.) The *Attachment Page* option will take people to a separate page where they can view the caption and description information for the document before downloading (usually not recommended since it takes people away from the current page). Do not use the *None* option; it is useless here.

4. Click on the **Insert into post** button.

5. The title of the document will be shown as an underlined link. If you need to edit that text, insert your cursor somewhere in the middle of the link, type what you want it to say, then delete the extra text from either end.

Tip: You do not need to add (PDF) or other extension indicators to your link text. When the page is saved, it will automatically detect the type of document and add a small indicator icon next to the download link so visitors can see what type of file it is.

Replacing a document in the Media Library

1. Click on the document to open the *Attachment Details* window.
2. Click the **Upload a new file** button.
3. Click the **Choose File** button (it is easy to miss!) and select the file on your computer.
4. Make sure the top **Just replace the file** option is selected.

Tip: When replacing documents, it is not recommended to use the second option that uses the new file name, as this will break any existing links that other people have created on other websites. It may update our links...but not other website's links!

5. Click the blue **Upload** button.
6. The file replacement upload is now complete. (Pressing the blue Update button again is not necessary.) You can click the *Permalink* link to verify, but be aware you may need to refresh your browser to see the latest document.