



mamboSchools Tutorial

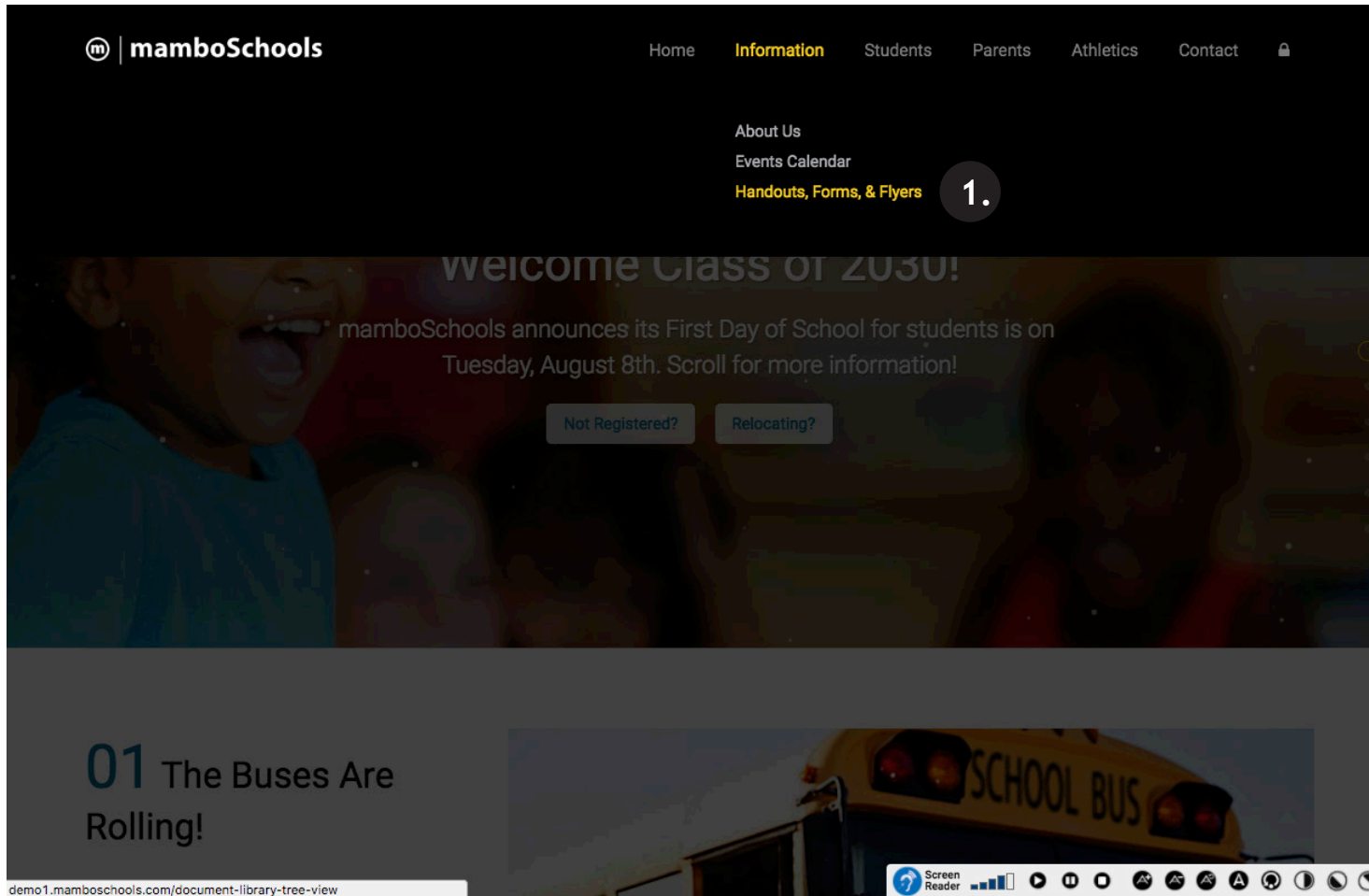
DocMan (v3.x) / Document Library Series (jv3.x)

1: Introduction & Creating a Document Library Category

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 files, like .doc, .zip, .pdf, etc., to your website. These documents are organized in categories and may be downloaded/reviewed by your school community.

Document Library Tour



Document Library Tour

Components are the main pages or sections of your website. Your public users view a component by visiting the home page or clicking a menu link.

The Document Library is a component for organizing and storing document files, like Word, PDF, Excel or Powerpoint. Documents are categorized in the library. Users can click a file link and download or transfer a file to their computer desktop.

The document library is accessed from the main menu along the top of each page of the mamboSchools™ website. It is usually linked from the 'Info', 'Information', 'Popular', 'Essentials', or 'Students & Parents' menu.

1. In our web site, the Document Library link is called "Handouts, Forms, & Flyers". Locate your Document Library Main Menu Link and click it.

The document library will now be displayed.

Document Library Tour (cont.)

Document Library Tour (cont.)

The document library main page is typically divided into two sections.

The upper section contains two modules or blocks of information about the document library. (Note: Sometimes these blocks are found in the lower area.)

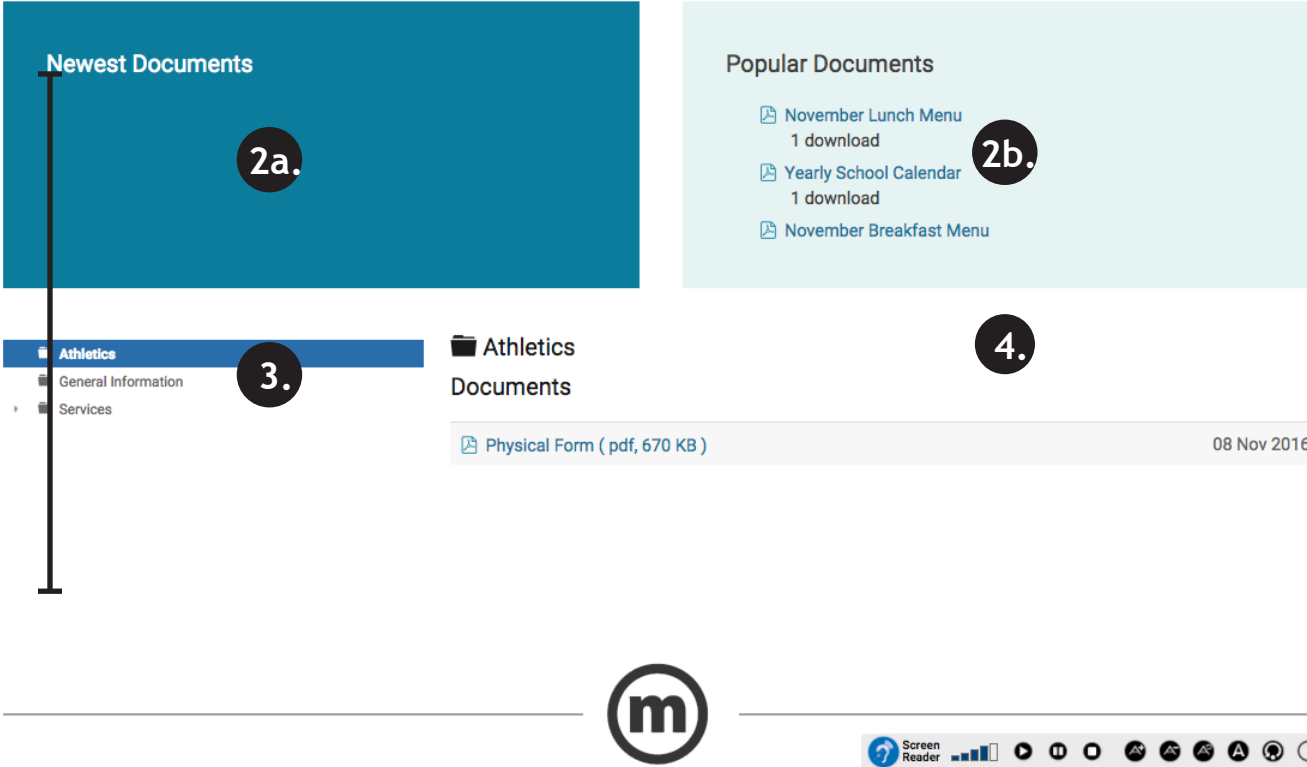
These two blocks automatically display:

- 2a. The latest documents uploaded to the library.
- 2b. A listing of the documents in one directory or category of your library.

The blocks help your community to locate new and targeted documents.

The lower section is the document library listing

- 3. Documents are organized and stored within the categories (represented by file folder icons) shown in this area. The category title and its description (optional) are shown in this listing.
- 4. To access the files within a category click at the title or the file folder icon. The file listing appears to the right.



The screenshot shows the mamboSchools Document Library interface. At the top is a navigation bar with links: Home, Information, Students, Parents, Athletics, Contact, and a lock icon. Below the navigation bar, the main content area is divided into two sections. The left section, titled 'Newest Documents' (callout 2a), is a blue box. The right section, titled 'Popular Documents' (callout 2b), is a light blue box and lists three documents: 'November Lunch Menu' (1 download), 'Yearly School Calendar' (1 download), and 'November Breakfast Menu'. Below these sections is a category listing (callout 3) with a sidebar on the left showing 'Athletics' (selected), 'General Information', and 'Services'. The main category listing shows 'Athletics Documents' (callout 4) with a file 'Physical Form (pdf, 670 KB)' dated '08 Nov 2016'. At the bottom of the page is a footer with the mamboSchools logo and a 'Screen Reader' toolbar.

Document Library Tour (cont.)

Document Library Tour (cont.)

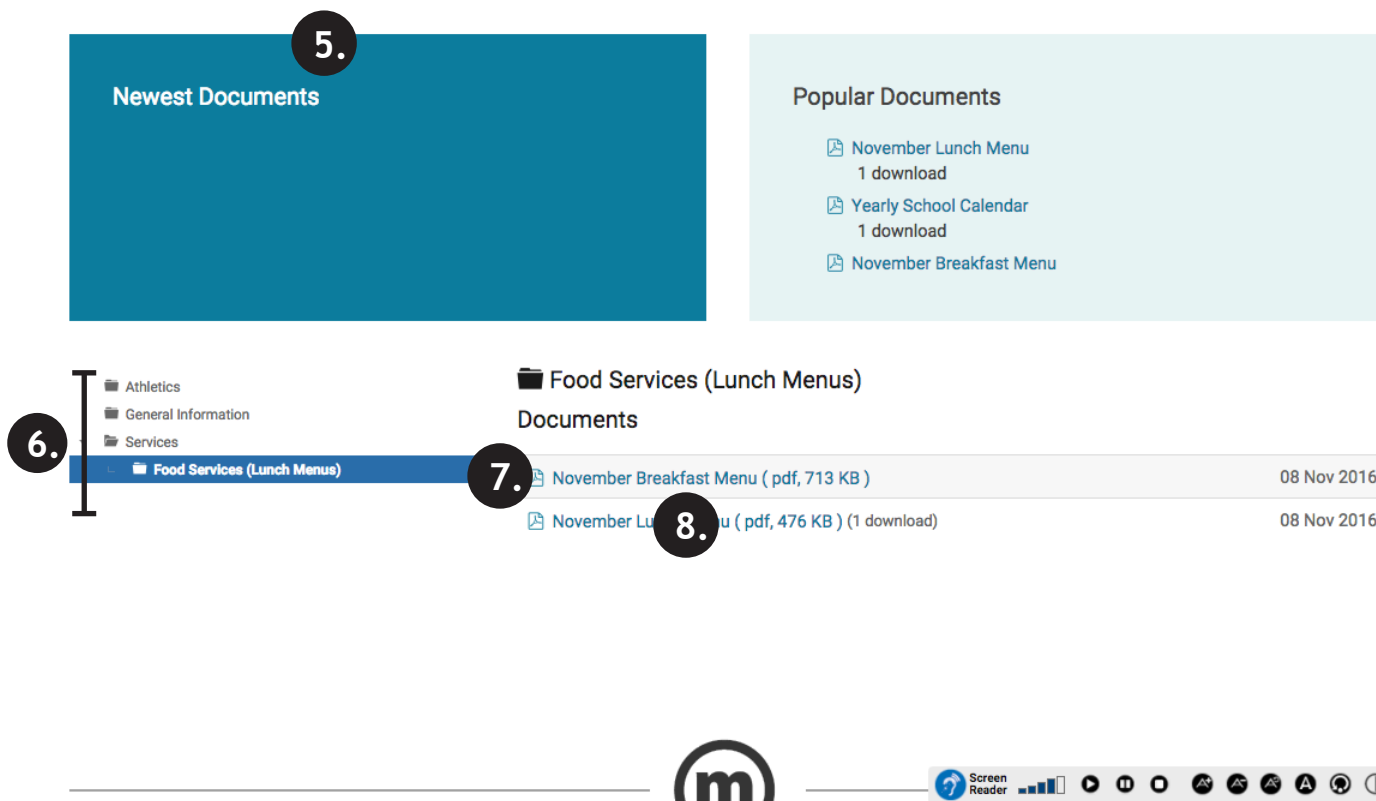
Click onto the 'Services' category and then onto the 'Food Services' subcategory that appears below.

6. Category Titles. Note: The 'Services' category has a tiny arrow to the left. This signifies the presence of a subcategory.
7. Every document entry contains the following information: file name, file size, file type and date posted. (An optional description for each entry can be shown.)
8. You can also click at the icon, title or the download button to transfer the file.

In this manual series, you will learn how to:

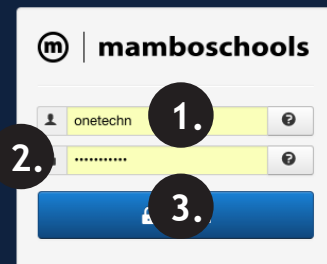
- a. Login to the administrative side of your site and create/edit a document library category
- b. Add a new document to the library.
- c. Update a document that already exists.
- d. Add document entry links to the main menu or web pages.

If you know how to login to the admin side of your web site, skip to page 7 to learn about document library categories.



The screenshot shows the mamboSchools Document Library interface. At the top, there's a navigation bar with links: Home, Information, Students, Parents, Athletics, Contact, and a lock icon. Below this, the main content area is divided into two sections: 'Newest Documents' (highlighted with a blue background and a callout '5.') and 'Popular Documents' (light blue background). The 'Newest Documents' section is currently empty. The 'Popular Documents' section lists three items: 'November Lunch Menu' (1 download), 'Yearly School Calendar' (1 download), and 'November Breakfast Menu'. Below these sections, there's a sidebar on the left with a list of categories: Athletics, General Information, and Services. The 'Services' category is expanded, showing a subcategory 'Food Services (Lunch Menus)' (highlighted with a blue background and a callout '6.'). The main content area below the sidebar shows a list of documents under the 'Food Services (Lunch Menus)' category. The first document is 'November Breakfast Menu (pdf, 713 KB)' dated '08 Nov 2016' (callout '7.'). The second document is 'November Lunch Menu (pdf, 476 KB) (1 download)' dated '08 Nov 2016' (callout '8.'). At the bottom of the page, there's a footer with the mamboSchools logo and a 'Screen Reader' button.

Logging into the mamboSchools™ Admin Area



The screenshot shows the login interface for mamboSchools. At the top, there is a logo with a lowercase 'm' inside a circle, followed by the text 'mamboSchools'. Below this, there are two input fields and a button. The first input field is for the username, containing the text 'onetechn', and is marked with a black circle containing the number '1.'. The second input field is for the password, containing a series of dots, and is marked with a black circle containing the number '2.'. Below these fields is a blue button with a white lock icon and the word 'Login', marked with a black circle containing the number '3.'.

Login to Admin Area

The administrative backend is a separate area hidden from your public and registered users.

The administrative backend is accessed by accessing the following web address:

<http://<enteryourwebsitename>/administrator/>

1. Click into the Username area. Type in your assigned username.
2. Click into the Password area. Type in your assigned password.
3. Click the “Login” button. The administrative control panel appears.

This area is locked with a password and hidden from Public and Restricted/Teacher Users. Only web managers and site administrators have access to this area.

Logging into the mamboSchools™ Admin Area (cont.)

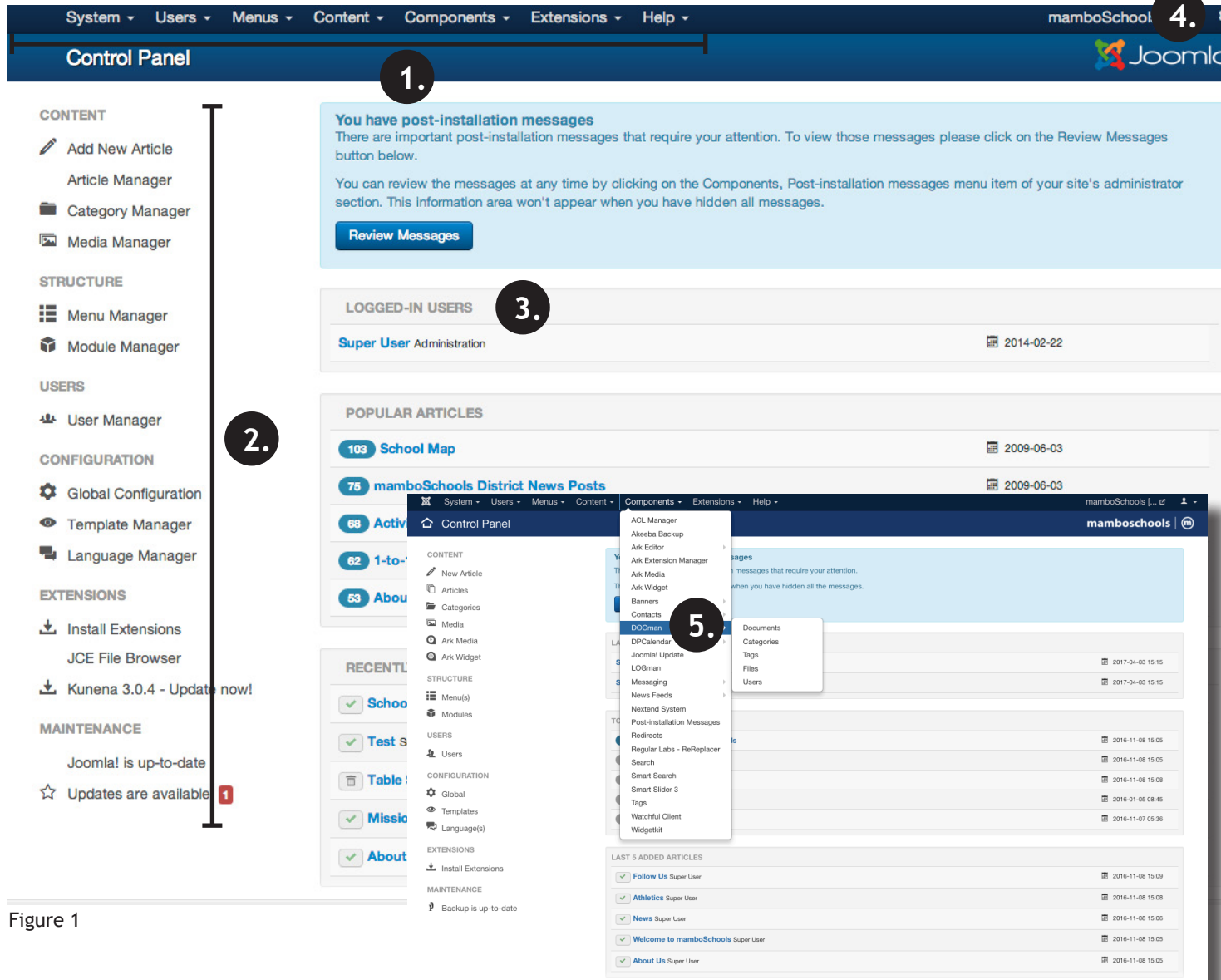


Figure 1

The Control Panel & Content Menus

The mamboSchools™ administration side has many ways to navigate through its commands and control panels.

Figure 1

1. The navigation menu allows access to all functions and commands within the administrative side of your site.
2. You also may wish to explore the control panel sidebar. This sidebar echos a few of the menu functions. One may choose a sidebar link for certain functions and commands.
3. This area lists the current “logged in users” on the public side (registered/teacher users) and backend (managers, administrators, super administrators). You can access other statistical information by clicking the dropdown drawer areas.
4. To logout of the administrative backend click the Profile Settings link (upper right corner) and select Log.

Figure 2

5. To access your site document library, you must access the DocMan Component. Select the ‘Component’ menu > DocMan.

Figure 2

The Document Library

The screenshot shows the MamboSchools Document Library interface. The top navigation bar includes links for System, Users, Menus, Content, Components, Extensions, and Help. The main content area is titled 'Documents' and features a sidebar on the left with 'Categories' and 'Tags' sections. The 'Categories' section shows a tree view with 'All Categories' selected. The main area displays a list of documents with columns for Status, Access, Owner, Date, and Category. A search bar is located at the top right of the document list. Numbered callouts highlight specific features: 1. Documents sidebar, 2. Document list table, 3. Document entry details, 4. Category column, 5. Categories sidebar, and 6. Search bar.

Status	Owner	Tags	Group	Access	Date	Category
Published	Public Inherited	Super User	08 Nov 2016	General Information	1	
Published	Public Inherited	Super User	08 Nov 2016	Athletics	0	
Published	Public Inherited	Super User	08 Nov 2016	Food Services (Lunch Menus)	0	
Published	Public Inherited	Super User	08 Nov 2016	Food Services (Lunch Menus)	1	

Document Library Menu

When the document library opens, you land in the 'Documents' area or view.

1. The document library is divided several main areas. The two you will use are:

Documents - Within this area, you upload new files and create public document entries. You may also update old entries with new files or information.

Categories - When opening your site document library, this area allows you to create the home categories (and sub-categories) to store your documents.

2. From the document area, you can review all of the document entries within the library. Feel free to scroll through this document entry listing.
3. Each document entry has a title. Please note below the name of the entry is the file that is tied to it and the size of this file.
4. You can see the category assigned to a document by browsing the category column.
5. Also, you can click at a category within the category browser to the left side. When you click at a category, only those document entries assign to the category appear. NOTE: Click the 'All Categories' link to return to the complete list.
6. You can search for a document entry by entering a portion of the title in the search area and tapping RETURN/ENTER. To return to the complete list, click the 'X' to the right of the search area.

Adding a Document Library Category

The screenshot shows the mamboSchools interface. The sidebar on the left has a 'Categories' link highlighted with a red circle and the number '1.'. The main content area shows a table of categories. The top bar has a 'New' button highlighted with a red circle and the number '2.'. The table has columns for Status, Owner, Group, Access, Title, ID, Status, Owner, and Date. The first four rows of the table are highlighted with red circles and the numbers '3.' and '4.'. The categories listed are Services, Food Services (Lunch Menus), General Information, and Athletics, all with a status of 'Published' and owned by 'Super User'.

Status	Owner	Group	Access	Title	ID	Status	Owner	Date
Published	Public Default	Super User		Services	0	Published	Public Default	08 Nov 2016
Published	Public Inherited	Super User		Food Services (Lunch Menus)	2	Published	Public Inherited	08 Nov 2016
Published	Public Default	Super User		General Information	1	Published	Public Default	08 Nov 2016
Published	Public Default	Super User		Athletics	1	Published	Public Default	08 Nov 2016

Adding a Document Library Category

Your first step in planning your site document library is to create new categories or directory folders to store your files.

A document library category is similar to a folder (or directory) on your computer desktop. A category is used for organizing and storing documents.

1. Select the 'Categories' link, to access this area.

A list of current categories appear.

2. In our exercise, all of categories are published. These categories are all active and the files organized under them are available too.

3. In our exercise, all of the categories are available to your public users. None of the categories are restricted to certain user groups, like the administrators or registered users.

To create a new category:

4. Click the 'New' button located in the button bar above and to the left of the list area.

Adding a Document Library Category

The screenshot shows the MamboSchools interface with the 'Adding a Document Library Category' form. The form is divided into several sections:

- Publishing:** Includes a 'Save' button (highlighted with a '4.' callout), a 'Close' button, a 'Save & New' button, and a 'Cancel' button.
- Category Title:** A text input field (highlighted with a '1.' callout).
- Parent Category:** A dropdown menu (highlighted with a '2.' callout).
- Content Area:** A large text area (highlighted with a '3.' callout).
- Status:** Includes 'Published' and 'Unpublished' buttons.
- Date:** A date input field.
- Folder:** Includes 'Automatic' and 'Custom' buttons.
- Current:** Includes a 'Please save to calculate' button.
- Image:** Includes 'None' and 'Custom' buttons.
- Permissions:** Includes 'Use default', 'Groups', and 'Presets' buttons.
- Owner:** A dropdown menu showing 'Super User'.

Adding a Document Library Category

To add the category:

1. Type a Category Title. NOTE: The category name is seen by the public in the document library list.
2. **OPTIONAL:** Select a 'parent' category from the dropdown. If you select no parent item, the category will be shown in the opening list. If you select another category as the parent, your category becomes a 'subcategory' of this parent.
3. **OPTIONAL:** Type a brief description of what may be found in the category. We recommend adding a description to add interest to the document library list.
4. Click the "Save & Close" button. You will be returned to the Category list.

A category has been added to the document library. This completes the first in the document library learning series. Continue with the second in the series: Adding a File to the Document Library.

If you wish to learn how to edit a category, go to the next page.

Editing a Document Library Category

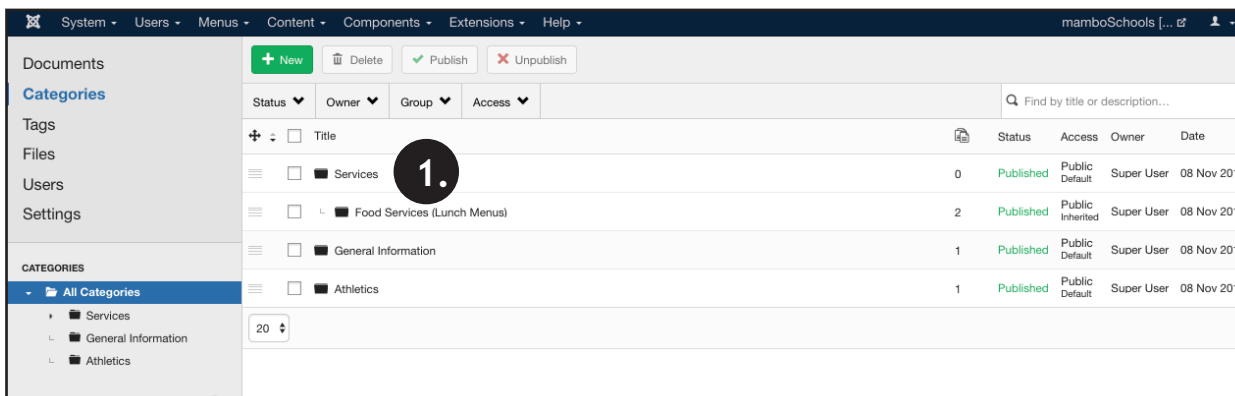


Figure 1

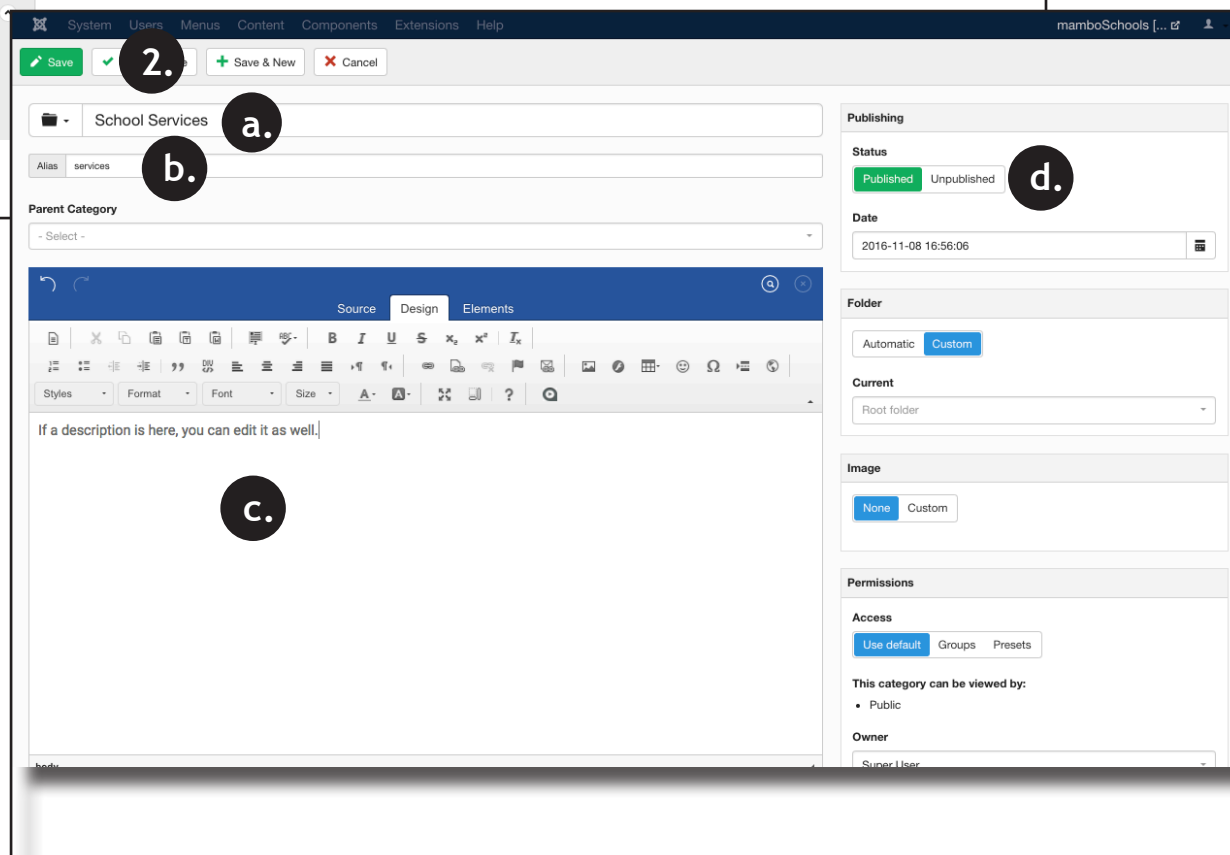


Figure 2

Editing a Document Library Category

To edit or change the title and name of a category:

See Figure 1

1. Locate the category title you wish to edit, select the category title link from the list.

See Figure 2

You may change any one or all of the following:

- a. Edit the Category Title
 - b. Change the 'Parent Category'
 - c. Edit the Description
 - d. Change the status from a published category to unpublished. You can temporarily hide the folder from the public by clicking between the folder status.
2. Click the "Save & Close" button. You will be returned to the Category list.

This completes the first in the document library learning series. Continue with the second in the series: Adding a File to the Document Library.