How To Upload and Link to a PDF Document on Wordpress

What Type of Documents Can Be Uploaded?

The document library can store any type of media or file. It's preferable to store text-based documents (such as those that come from Microsoft Word or Mac Pages) to a PDF. This ensures that the document is compressed and not editable (unless it's saved as an editable PDF, that is).

Creating and Naming a PDF Document

Once you're finished editing your document, save it as a PDF using the naming conventions listed below. Naming conventions help us stay organized as the document library grows over time. As a general rule:

- **Omit dates and version numbers** from file names, except when a date is necessary in the document title such as for monthly publication or similar. Keep version and date in the document itself, in the footer or on the title page.
- Put file names in **lowercase with no spaces**, and use hyphens (newsletter-october-2018)
- Do not use special characters other than hyphens
- Use conventions for similar types of documents, for example (newsletter-october-2018, newsletter-november-2018, brandbook-2018, brandbook-2019, etc)
- Examples:
    - YES: wg-brandbook-2017
    - YES: bighorn-sheep-study-march-2018
    - YES: climate-newsletter-june-2018
    - NO: wg-brandbook-web-04_11_2018
    - NO: AnnualRpt_2014_HI
    - NO: AnnualRpt_v2.11_2014_HI
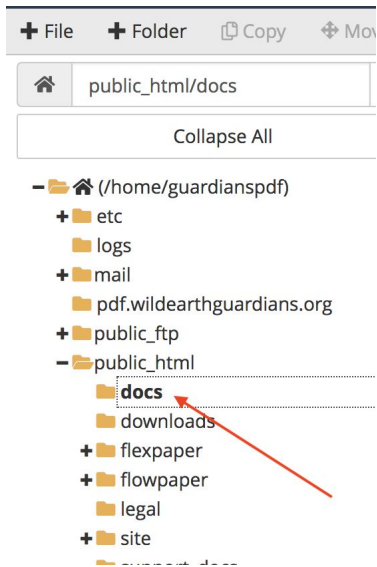
Uploading a Document Using CPanel

CPanel is a web interface for managing files on the document server.

1. Load CPanel at this link: https://pdf.wildearthguardians.org:2083
2. Log into the CPanel
    a. Username: guardianspdf
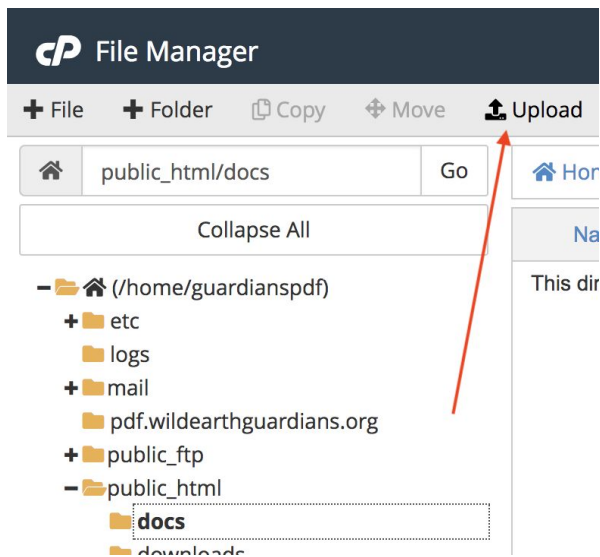   b. Password: Check the Trello card or ask Dave

3. Once in the CPanel, click on **File Manager**
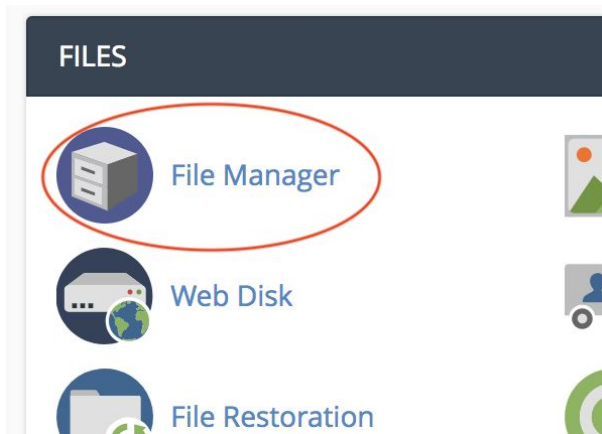
4. In the left column folder browser, navigate to **public_html/docs**

5. Click the **Upload** button

6. Drag the file to the page or click the Select File button and browse to the file that you want to upload.

Uploading a Document Using FTP

Use an FTP client to transfer the file to the server. Fetch (for Mac) is free for non-profits: http://fetchsoftworks.com/fetch/download/. WinSCP (for Windows) is free: https://winscp.net/eng/docs/free_ftp_client_for_windows

1. Configure the FTP client with the following parameters:

Host	ftp://pdf.wildearthguardians.org
User:	guardians@pdf.wildearthguardians.org
Password:	Check the Trello card or ask Dave
Protocol:	FTP
Default remote directory or folder:	/docs/
Default local directory *(optional)*:	This will be the the directory you are saving the files to on your computer, probably your Documents folder.

2. In the left panel of the FTP client, find the folder where you saved the document. Double-click into folders to navigate if needed. It'll look something like this:
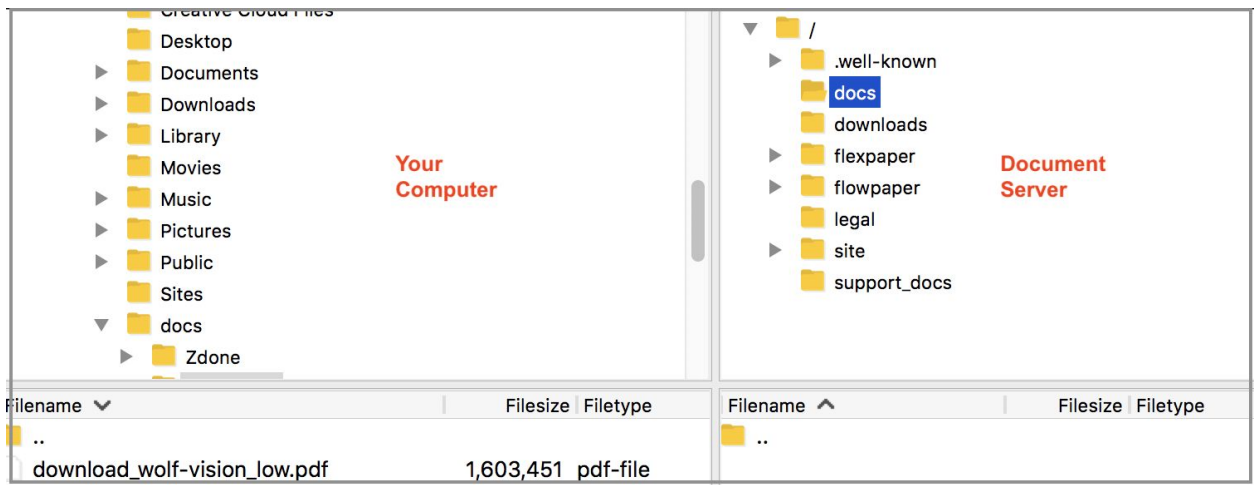
3. Drag and drop the **document** from your local site to the remote site. Be sure to drop onto the docs folder or blank area of the screen, and not onto one of the other folders.

Linking to the Document

Now that your file is uploaded, you can link to it from a WordPress page. The URL will be:

https://pdf.wildearthguardians.org/docs/document-name.pdf