

# WILLIAM & MARY TribeLink

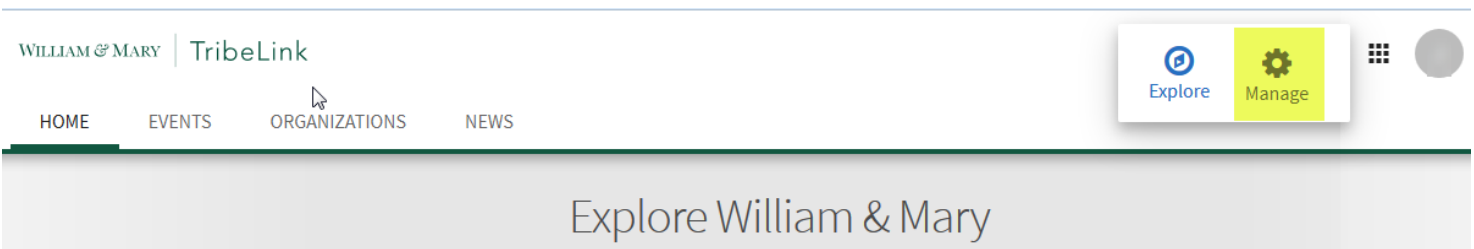
## How To Manage Your Organization's Documents

*TribeLink can serve as a repository for important documents for student organizations, providing a centralized and easily accessible place to store documents. With the robust privacy/permissions settings, organization leaders can determine if documents can be available to a public audience, or if access should be limited to members/leaders only. Storing and sharing documents in TribeLink can be really helpful to an organization's operations, especially during times of leadership training and transition.*

### General Instructions to Access Organization Documents

To upload and manage documents, you will first need to access the organization's Document page within TribeLink. Here are some instructions to get to that page, instructions for the specific functions can be found throughout this resource.

- 1) Log into TribeLink
- 2) Select "Manage" using the grid shaped icon in the top right corner of the screen - this will take you to the Action Center



- 3) In the Action Center, select the organization you would like to manage
- 4) When you are on the organization's home page, you will use the menu on the left hand of the screen to access the various management functions you have



- 5) Select Documents - You are now ready to start uploading/managing documents, files, and folders for your organization.



Additional Questions?

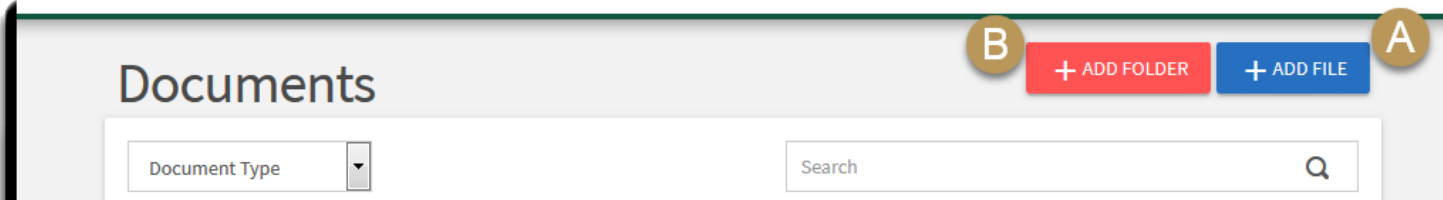
Email [tribelink@wm.edu](mailto:tribelink@wm.edu) or check out the Engage Help Center for online resources like:

[Documents Overview](#)

[Creating Document Libraries](#)

[Updating an Existing Organization Document](#)

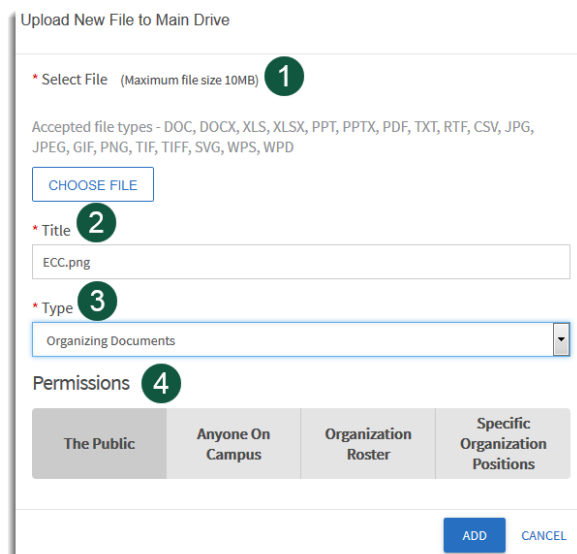
## Uploading Documents and Creating Folders



When managing documents, you can upload files (A) and/or create folders (B) to help organize the documents. When you upload a document or create a folder, you can set the appropriate level of permission for that item/content. Here is a description of the various permission settings:

- The Public—Anyone in the world with the link to the content can access the page; this does not require someone to have log-in credentials to the TribeLink site.
- Anyone On Campus—Anyone with valid W&M credentials can view this when logged in to TribeLink.
- Organization Roster—Only users listed on the organization roster can view/access the content when logged-in to TribeLink.
- Specific Organization Positions—Only those individuals who have been assigned the selected positions will be able to view/access the content when logged-in to TribeLink.

To upload a file or a file within a folder start by clicking “+Add File.” You will then see a pop-up like the one to the right. You must first select the file to be uploaded (1), before the permission options (4) will be visible. The title of the documents will automatically populate with the name of the document as you have it saved, but you are free to change it when uploading it to TribeLink (2). You must then assign a type to the document (3). There are several options of document types to select from. It should be noted that documents uploaded as “Constitution/Bylaws” can only be deleted from an organization’s page by site administrators. The last step before adding the document is to select the permission level; keep in mind that folder must be visible to a user in order for that user to see the files within it. Finally, click “ADD.”



## Managing Files and Folders

Once a document is uploaded to TribeLink, you may need to update, share, delete, or change the permissions settings. You can do this easily by clicking on the three bullet icon to the right of the document/folder. Your options of what to update for a folder are: Open, Move, Rename, Permissions, Delete. Your options for updating a document are: Share, Move, Rename, Type, Permissions, Delete; you can also Download the document.

Things to note:

- Once a file/folder is deleted, it cannot be recovered.
- If a document has been uploaded as “constitution/by-laws” you can not update/change the document type.

