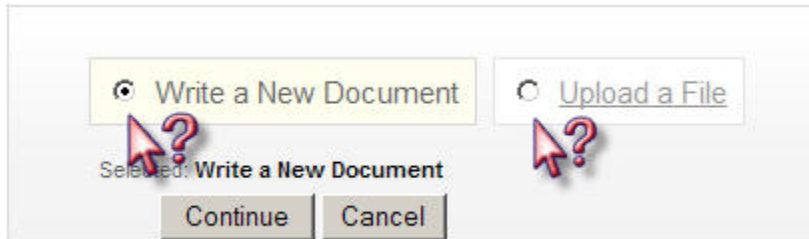


Guidelines for Uploading Files vs. HTML Documents

When creating a document you are given the choice to "Write a New Document" or to "Upload a File". This document is intended to provide some **simple guidelines** to help you decide which to choose.



When to Write a New Document

"Writing a New Document" in this case means to create an **html** document inside Clearspace (as opposed to uploading a file)

Use this option for:

- Documents that are intended for Clearspace only (e.g., not intended for donors or Digital Library)
- When developing text/wording during the draft stage of a document
 - This is especially effective when collaborating as a group.
- Transitory docs, such as training announcements, short-term scheduling documents
- Short informative documents for a limited audience: meeting minutes, contact info for team, etc.
- Summaries of longer documents or for pasting key sections of documents to facilitate comments
- Documents that require multiple attachments
- Documents linking to DL or to internet resources (see [Linking to Documents in the Digital Library](#))
- If you need to embed a video from YouTube or other video hosting site (see [How to Embed a Video into a Document](#))

When to Paste from pre-existing Word/PDF into a New (HTML) Document

- Document (or section of document) meets the above guidelines
 - Pasting into html is particularly useful for group editing

- ??Simple formatting
- ??No more than 3 to 4 pages long

When to Paste from pre-existing Excel table into a New (HTML) Document

- ??**Simple formatting:** no formulas, macros, visual basic, drop-downs menus, etc.
- ??You will not be able to sort columns or rows after pasting--if you need this functionality, attach the file.
- ??Tables with few columns. If the table is much wider than the Clearspace html document, there will be a scrollbar, so you won't be able to see the whole table at once.

Tips for pasting from Excel

- ??Do **not** copy the entire spreadsheet. Copy only the part of the spreadsheet you need, without surrounding unused cells.
- ??Gridlines should be *showing* when you copy the table, so you can be sure they will be there when you edit the table later.

When to Upload a File

Please take care not to upload files that are already in the Digital Library. Once a document moves to the DL, please replace the file with a link. ([Linking to Documents in the Digital Library](#))

Use this option for:

- ??Professional-level formatting or heavily formatting
- ??Finalizing drafts during group collaboration
- ??Soliciting comments on a document before submitting it to DL or donor
- ??Complex spreadsheets (see above)
- ??Documents over 4 pages
- ??Powerpoints
- ??Templates that team members will adapt to their local needs
- ??Pre-existing documents *that do not belong in the DL* that won't paste easily. (see [What Goes into the Digital Library as Opposed to Clearspace](#))

Considerations when Uploading Files

??If you need to temporarily upload a file so that a team member can access it, please delete it once the transfer is complete

??If you are collaborating on a large (1 MB or more) document and update this document several times, please delete old versions when they are no longer needed.

Important Related Documents

??[Problems with Attachments: Creating HTML Documents instead of Uploading Files](#)

??[Pending: Document Sharing in the Digital Library vs. Clearspace](#)