# CoLRiC Downloads Management Cheatsheet

These next few instructions relate to the Downloads plugin.

Instructions relating to the members area pages will be explained further down this document.

How to add a new downloads category

If the appropriate category does not exist create it

If you got to Dashboard/Downloads/Categories you will see the categories you can add documents to; this will help you to organise your downloads.
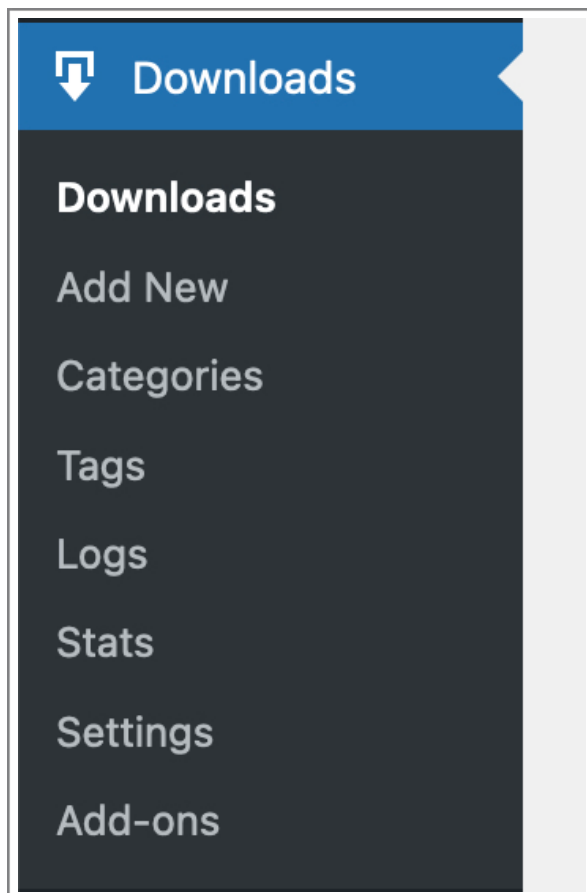
Click **'Categories'** from the menu. Add new categories by filling in the form with the name of your new category. You don't need to fill in the 'Slug' field, that will be filled in automatically when you add the category name.

When uploading a document make sure you add it to the appropriate category by clicking the checkbox.

You will be able to list all of the documents in that category - via a shortcode (discussed below). Any new new document you add to the category will automatically appear in the correct area of the page.

Ignore the idea of sub categories at this point

Within the downloads plugin all categories are 'top level'. i.e. don't think of categories and sub-categories. We will sort that out on the pages themselves.
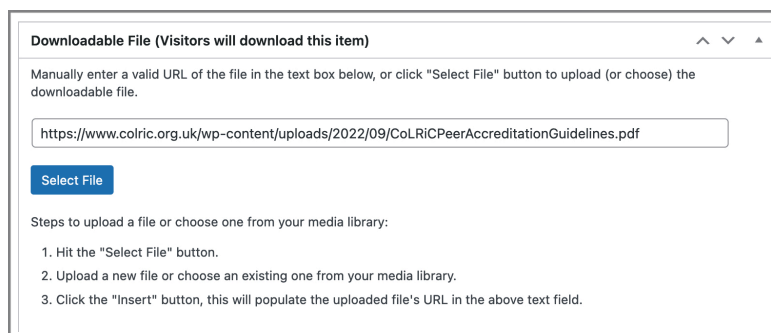
How to upload a new document

Got to Dashboard/Downloads/Add new. Fill in the name of your document, a description, and choose the appropriate category (i.e. Awards, Colric publications, etc).
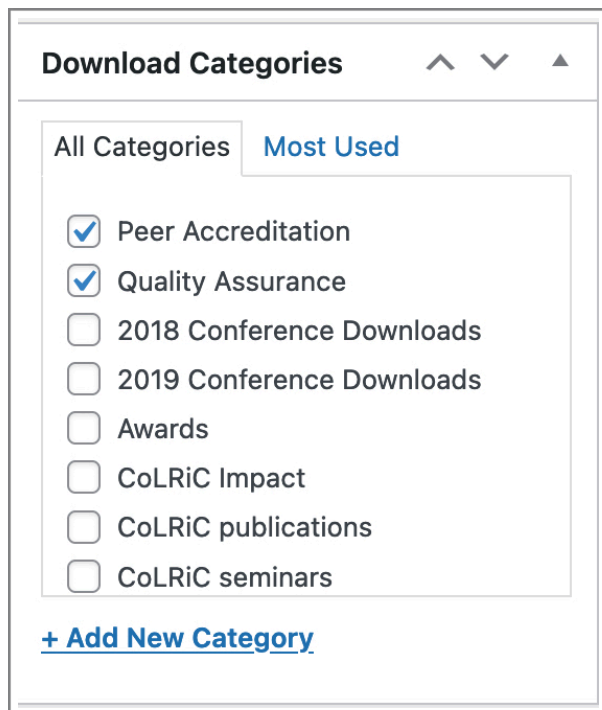
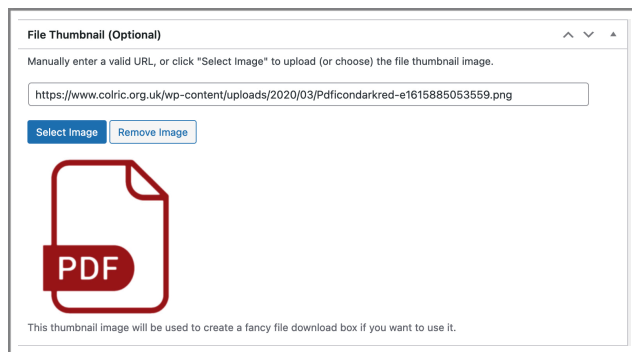The list of categories is on the right-hand sidebar.

Select the file you want to upload

Select the file from your computer.

Fill in anything else you think would be useful, e.g. excerpt text, file size, or tags.

Add an icon for your document via the File Thumbnail form (ie. a Word file or PDF file icon)

When you have filled in the form click '**Publish**'. If you are using categories to organised your downloads, the file will be automatically added to the correct page.

How to add documents to pages

Adding individual documents to a page

If you just want to add an individual document to a specific page, do the following:

After you have uploaded and published the document, scroll to the bottom of the page and you will see a 'shortcode'. Copy that shortcode and paste it into the page you want add that file to.

The shortcode will look something like the following:

```
[sdm_download id="530" fancy="0"]
```

Paste that into the page you want to have a download on.

Change fancy="0" to fancy="1" - to make it look a bit nicer.

```
[sdm_download id="530" fancy="1"]
```

When you update your page after adding the shortcode you will see the downloadable document on the page.

Additional Download options

You can change the text on the button using the button_text option:

```
[sdm_download id="5056" fancy="1"
button_text="Conference paper 2020"]
```

How to show documents in a subcategory

Show all the documents in a particular category using the category_slug with category name:

```
[sdm_show_dl_from_category category_slug="2019-
conference-download" fancy="1"]
```

Show the 3 most recent documents in the document library:

```
[sdm_latest_downloads number="3" fancy="1"]
```

Ordering documents on the page

Occasionally you will find yourself uploading documents in an order that doesn't reflect they way you want them to appear, on the page; for example if adding then all for the first time. To deal with this, first upload them all, and then change the 'published' date - from the right-hand sidebar to re-order them by date. When the shortcode is used to add them to the page - you can decide whether you want the newest or the oldest first.

```
[sdm_show_dl_from_category
category_slug="somecategory-name" fancy="1"
orderby="date" order="desc"]
```

These are ordered by date and 'desc' - which means newer first.

More shortcodes

- Find more shortcode options here: https://simple-download-monitor.com/miscellaneous-shortcodes-and-shortcode-parameters/

- And here: https://simple-download-monitor.com/?s=sort+order

Further options can be found on the documentation website:

https://simple-download-monitor.com/download-monitor-tutorials/

How to organise subcategories on members pages

It is best to keep menus on the sidebar simple - with no sub-sections. The way to add sub sections for you downloads is to add them to the pages themselves. For example on the 'Seminars and conferences' page I have added to sub-sections, for 2019 Conference downloads and 2018 Conference downloads.

Seminars and conferences

This section of the document repository includes the slide decks and associated documentation that support our online seminars alongside the programmes and presentations from previous conferences.

Subcategories:

RECENT CONFERENCE PRESENTATIONS

DOWNLOADS FROM OUR 2019 CONFERENCE

DOWNLOADS FROM OUR 2018 CONFERENCE

Each of the subcategory buttons above link to the appropriate heading further down the page.

Adding subcategories isn't difficult but it does mean editing the HTML on the page so my advice would be to work out what subcategories you are going to need in each section first - and have them all added now; so you don't need to code them later.
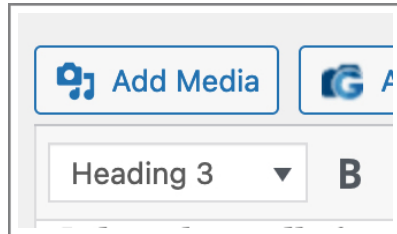
Adding subcategory headings

Scroll down below the existing documents - but ensure you are adding your hiding within the members only area, i.e., after

[members role="or:author,contributor,editor,administrator"]

But before

[/members]

Make your subcategory headings 'Heading 3' from the WYSWYG menu when editing a page.

Click the Text editor tab on the editing form and scroll down to the heading you have just created.

Surround the heading with a div tag that contains an anchor id. For example,

```
<div>

<h3>2018 Conference Downloads</h3>

</div>
```

Then add an anchor id and and a styling class to the div tag, for example:

```
<div id="2018ConfernceDownloads"
class="downloadsubheadingarea">

<h3>2018 Conference Downloads</h3>

</div>
```
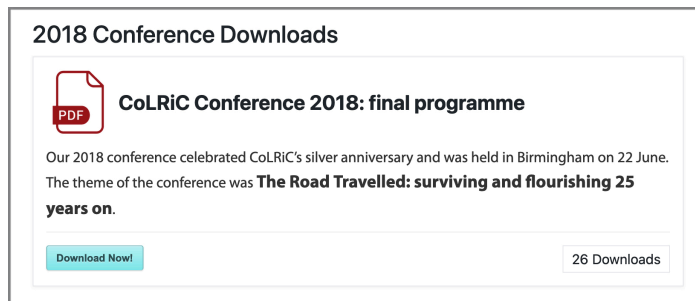
Finally add the shortcode to list the documents in the category.

```
<div id="2018ConfernceDownloads"
class="downloadsubheadingarea">

<h3>2018 Conference Downloads</h3>

[sdm_show_dl_from_category category_slug="2018-
conference-downloads" fancy="1" orderby="date"
order="desc"]
```

```
</div>
```

Your page now looks like this - using the example of the 2018 Conference downloads

Linking to your new heading

Create the button that links to that heading by copying one of the existing buttons at the top of the page and changing the link text to the value of the id you created earlier.

For example, to add a link to the 2018 conference downloads I copied the 2019 link and changed the value of the link to #2018ConfernceDownloads:

Downloads from our 2018 Conference
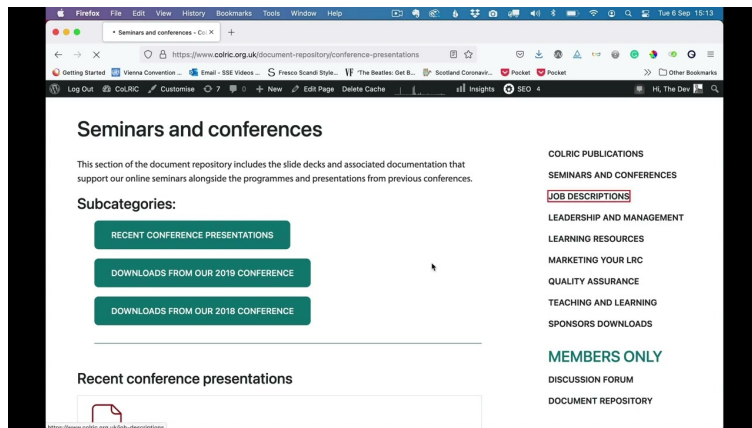
You now have a button that will link to your new subcategory.

A video: adding subcategories to pages

 Here is a short video I made of me copying the subcategories code from the Conferences page to to the employment page.

Watch the video so that you can see how easy it will be to add more subcategories in the future; just by copying what I've already done.

Video:

How to add links to the members sidebar menu

To add a new link to the sidebar menu, **first create a new page, unless you want to add an existing page to the men. .**

Dashboard/Pages/Add New

Fill in the form for the new page. Set the template to Downloads Template and the category to Shared Documents.

This is the page you will add your downloads to. I.e., if you created a set of downloads that you put into 2017 Conference Downloads. You would add the shortcode for that category to this page.

Add the link to the new page to the menu

The go to Appearance/Menus and choose the Downloads Categories menu from the pull-down menu.

Look for the new page you have added from the left-hand sidebar 'Page' click the checkbox for the page and then click 'Add to Menu'. This will move the page over to the menu. It will put it at the bottom of the menu but you can drag it to the position you want it. Click 'Save Menu'.

Your new page will now be on the correct section menu. If you visit the members downloads page you added you should see it on the menu (assuming you chose the right section template for the page).

A video: adding a new link to the menu

Here is a video of me creating a page for your videos and adding it to the members only menu.

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