

Intro to Website Building in WordPress for Public Collaboration

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INSH5602: Documenting Fieldwork
Prof. Ángel David Nieves + Prof. Doreen Lee
Spring 2023



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RECKONINGS
*A local history platform for
the community-archivist*

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Module 2: Using + Maintaining WordPress



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Module 2: Using + Managing WordPress

- Editing in WordPress
- Templates in WordPress
- Demonstration: Reckonings Project WordPress
 - Class Activity: create a “people” profile
- WordPress Documentation + Troubleshooting

Slides and materials are available at:

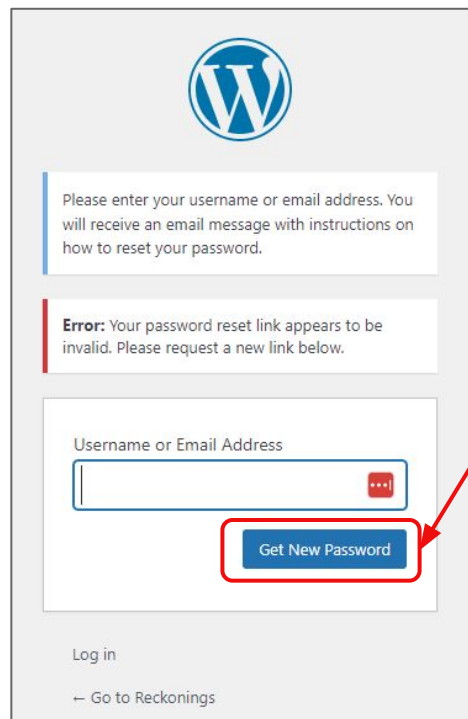
<https://bit.ly/sp23-nieves-lee-insh5602-wordpress>



WordPress Demonstration Preparation

For the hands-on activity exploring the Reckonings Project demonstration site, look for an email with the subject “[Reckonings] Login Details” in your Northeastern inbox.

NOTE: Check your Junk folder.



The screenshot shows the WordPress password reset interface. At the top is the WordPress logo. Below it, a message states: "Please enter your username or email address. You will receive an email message with instructions on how to reset your password." An error message in a red box says: "Error: Your password reset link appears to be invalid. Please request a new link below." There is a text input field labeled "Username or Email Address" with a red eye icon for toggling visibility. Below the input field is a blue button labeled "Get New Password", which is highlighted with a red rectangle. At the bottom, there are links for "Log in" and "Go to Reckonings".

If the link expires, simply enter your Northeastern email and select “Get New Password” to reset your password.



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Editing in WordPress



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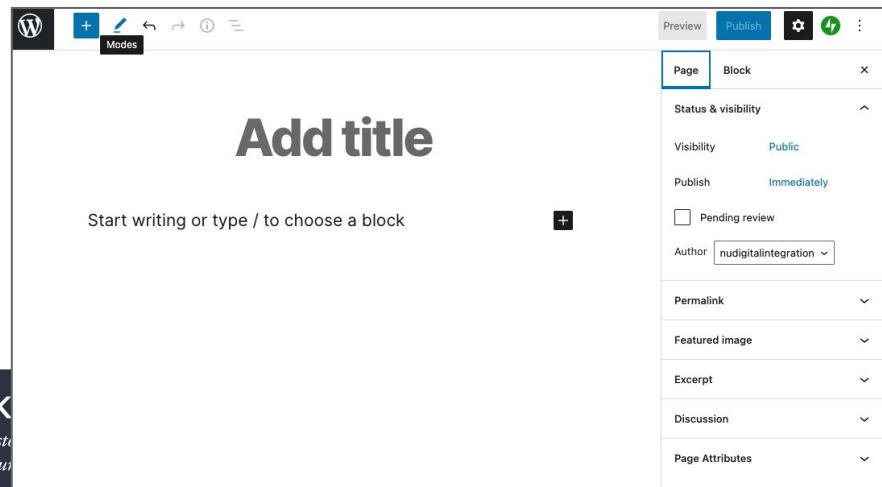
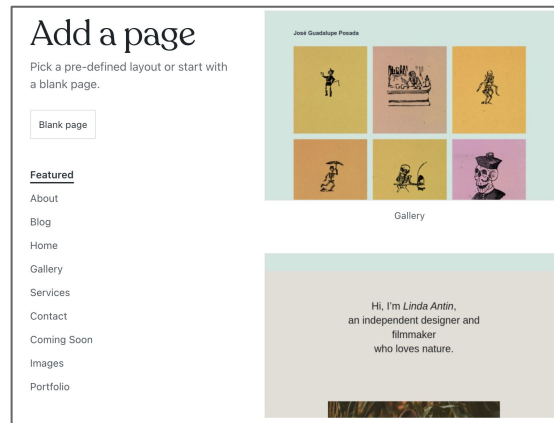
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Visual Editor (Pages and Posts)

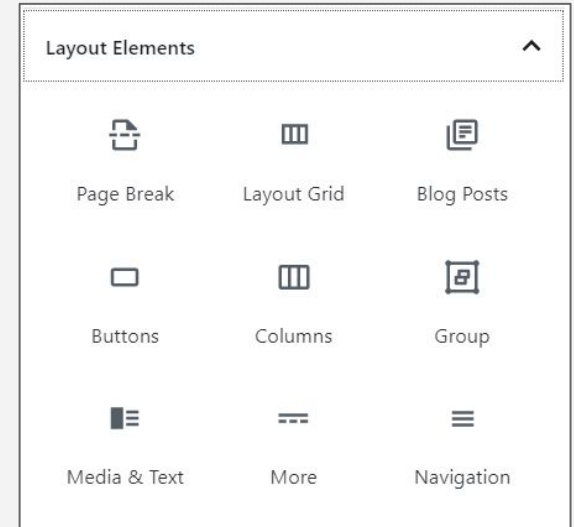
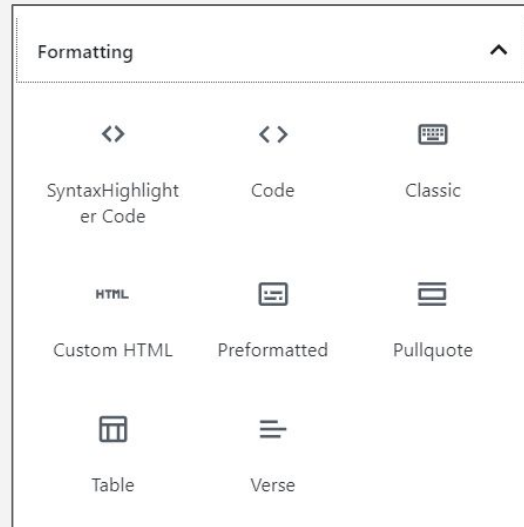
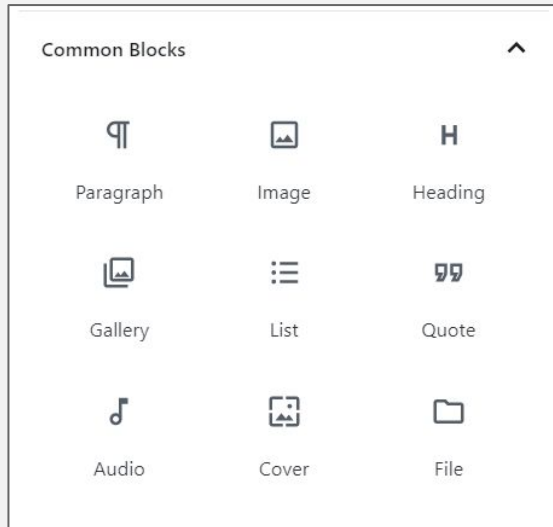
- Creating a new page will open up the visual editor.
- You can pick a predefined layout or start with a blank page.
- You have options to style your content (font size, styles, colors, add images, add links, bullet points, etc).

NOTE: You can use HTML for customization. However, there are some themes that have backend HTML/CSS that does not allow certain changes. Check your theme documentation!



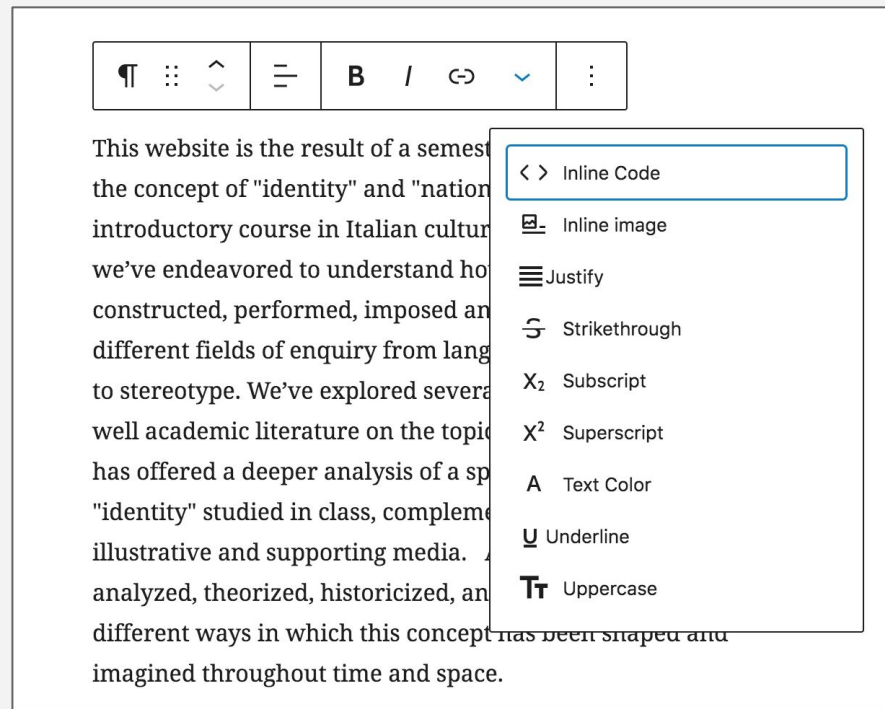
About WordPress Blocks

WordPress pages are organized into pre-formatted sections called “**blocks.**” Blocks allow you to manipulate the layout of the page. These include:



Add text

The default type of block is a **paragraph**. When you add a new paragraph, you will be taken to the editor interface, which allows you to add and edit text in a variety of ways. It looks similar to a word processor, complete with a **menu bar** allowing you to italicize, bold, or otherwise format the text.



The screenshot displays a text editor interface. At the top is a menu bar with icons for paragraph alignment, bulleted list, numbered list, bold, italic, link, and a dropdown arrow. Below the menu bar is a text area containing a paragraph of text. A dropdown menu is open, showing options: Inline Code, Inline image, Justify, Strikethrough, Subscript, Superscript, Text Color, Underline, and Uppercase. The text in the background is partially obscured by the dropdown menu.

This website is the result of a semester-long project that explored the concept of "identity" and "nation" in the context of an introductory course in Italian culture. In this course, we've endeavored to understand how identity has been constructed, performed, imposed and negotiated in different fields of enquiry from language to culture to stereotype. We've explored several different well academic literature on the topic and how it has offered a deeper analysis of a specific aspect of "identity" studied in class, complemented by illustrative and supporting media. A more detailed analysis, analyzed, theorized, historicized, and contextualized different ways in which this concept has been shaped and imagined throughout time and space.



Format

Here are some examples of things that you can format with your blocks. This includes choosing different levels of headings and changing the color of your text. The formatting options available will depend on the type of block you are working on.

¶

⋮

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B

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⋮

Here you can add some text in a **paragraph**.

Custom color

Clear

🚩

⋮

^

H2

≡

B

/

↺

▽

⋮

Heading

H1

H2

H3

H4

H5

H6

The logo for Northeastern University, featuring a stylized red and grey 'N' with a cluster of small grey squares to its left.

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The logo for RECKONINGS, featuring a stylized red and white 'R' inside a dark blue square.

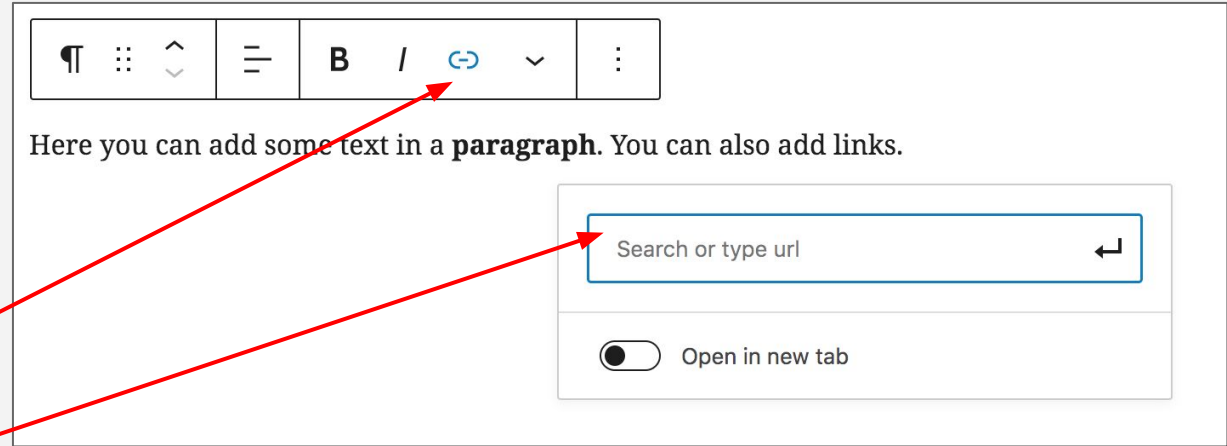
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Add Links

If you are interested in adding **links** to your page, you can do that by:

1. Selecting the text you wish to add a link to.
2. Click the “**Insert link**” button in the menu.
3. Adding the URL in the link window.



The screenshot shows a text editor interface. At the top is a toolbar with icons for text alignment, bulleted list, numbered list, bold, italic, and a link icon (a chain link). Below the toolbar is a text area containing the sentence: "Here you can add some text in a **paragraph**. You can also add links." To the right of the text area is a link input window. This window has a text field with the placeholder "Search or type url" and a search icon (magnifying glass). Below the text field is a toggle switch labeled "Open in new tab". Two red arrows originate from the list items on the left: one points from item 2 to the link icon in the toolbar, and the other points from item 3 to the text input field in the link window.

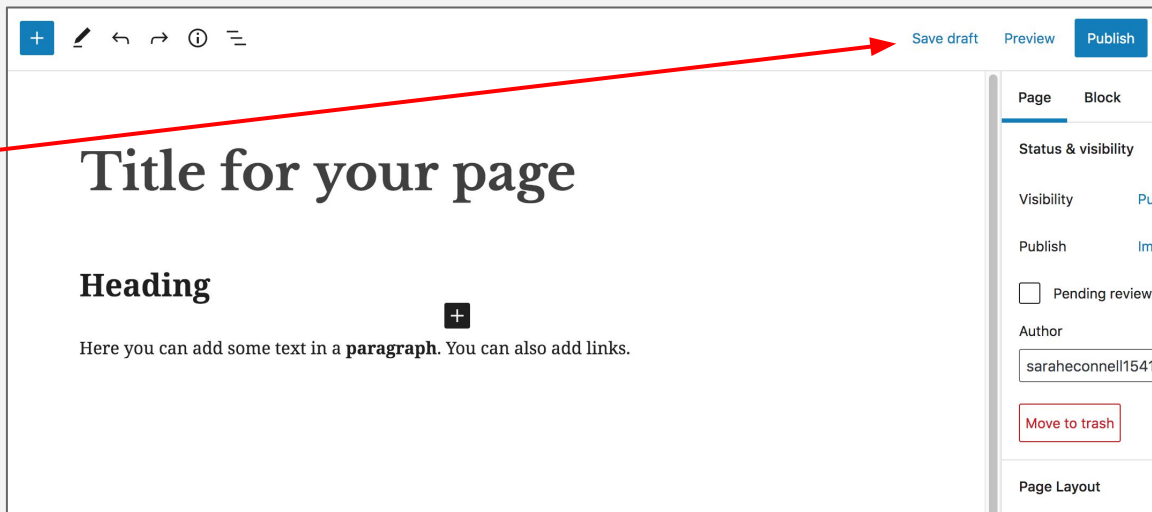


Save Draft

When you are working, it is very important to save your changes. It is generally best practice to have only one person working on a page/post at a time to ensure all changes are saved.

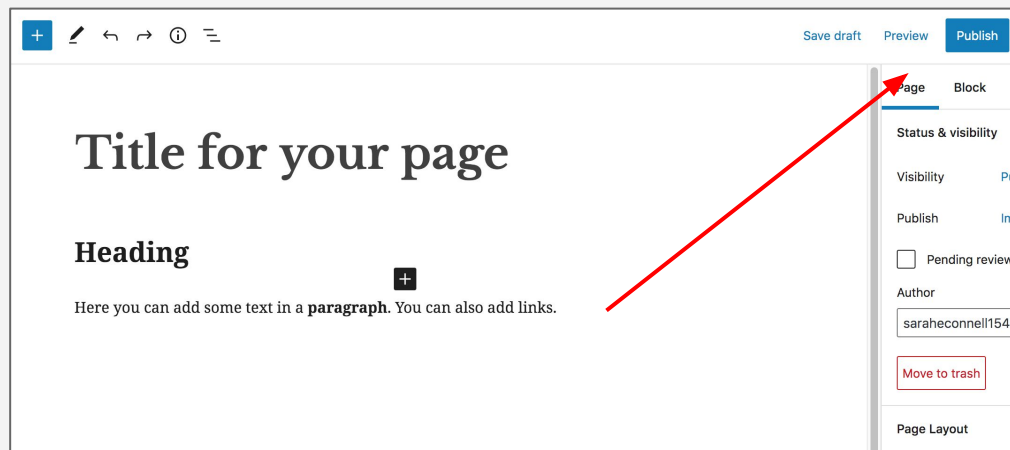
To save your draft, click the **“Save Draft”** button on the right-hand side of the screen.

Saving your page as a draft does not mean that it is visible on the website. Only publishing the page will make it available online.



Preview and publish

As you are editing your page, it is useful to see how your changes will look on the website itself. You can preview any changes you make with the “**Preview**” button on the right-hand side. This will open a new tab in your web browser, showing the page. When you are ready to publish, hit the “**Publish**” button.

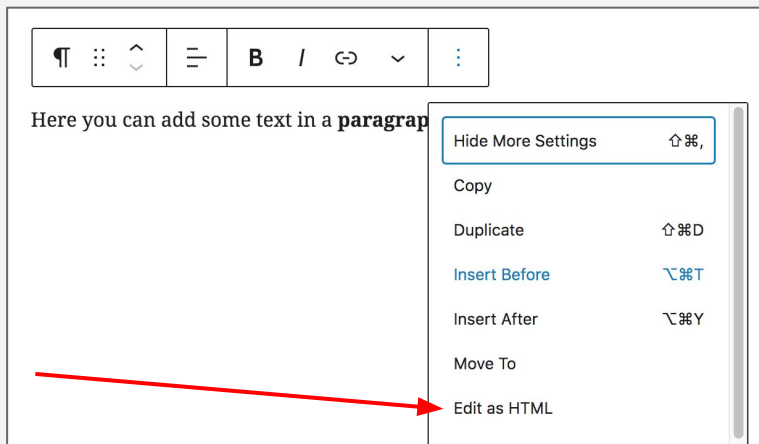


HTML Editor

When you are editing blocks, you can toggle between the **Visual** and **HTML** editors with the "View HTML" button under the three dots for "more options". The HTML editor is the "back end" version of the website. To switch back, go to the same menu and pick "edit visually."






Here is the same paragraph in HTML:

```
<p>Here you can add some text in a <strong>paragraph</strong>. You can also  
add <a href="https://en.wikipedia.org/wiki/URL">links</a>.</p>
```




Add Images

If you want to add images in your document, you can do so by adding a new block of the type "**Image.**" Then, you can either upload a new image or select one from the library of media files already uploaded to the site. Once you have added images, you can then edit and format them.

in a **paragraph**. You can also add links.

 **Image**

Upload an image file, pick one from your media library, or add one with a URL.

Upload

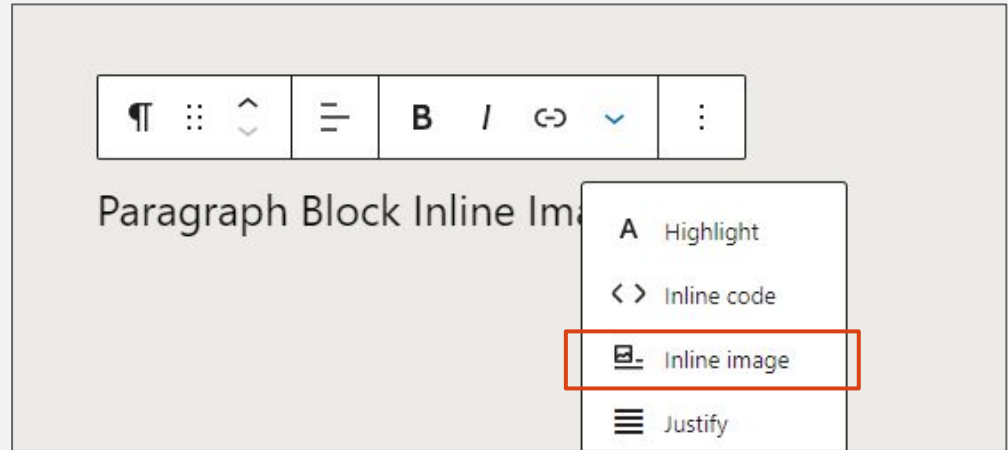
Select Image

Insert from URL

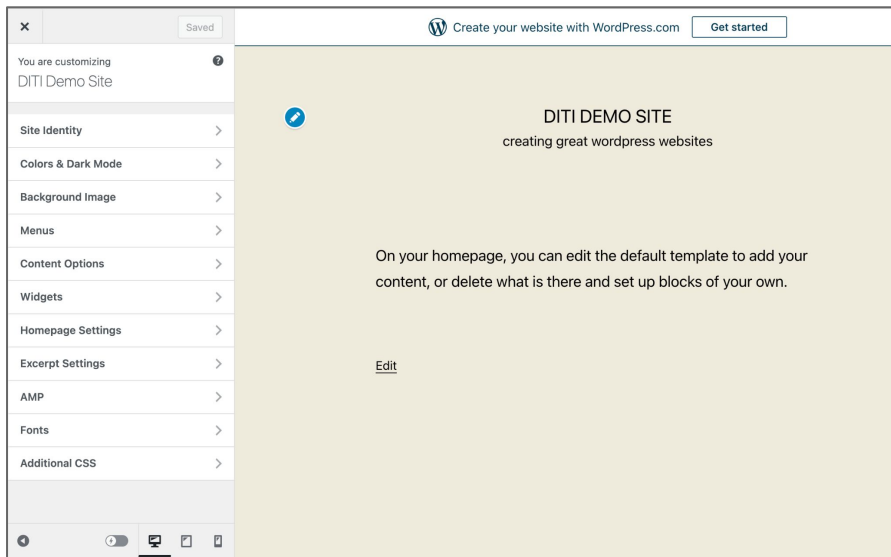


Add Inline Images to Paragraphs

If you want to add images in your paragraph block, you can do so by adding a new block of the type **"Paragraph."** Then, you can click the down arrow on the block toolbar and select "Inline Image." You can either upload a new image or select one from the library of media files already uploaded to the site. Once you have added images, you can then edit and format them.



Customize your Theme



- The Customizer is where you will go to take your site's Theme to the next level.
- From this section, you can change your Site Title and Tagline, add Widgets to a Sidebar or Footer, create Menus, change your Homepage Settings, and more.
- In the left-hand column of your homepage/dashboard, scroll to **“Appearance”** and then click the **“Customize”**

For more information on customizer tool, see: <https://wordpress.com/support/customizer/>



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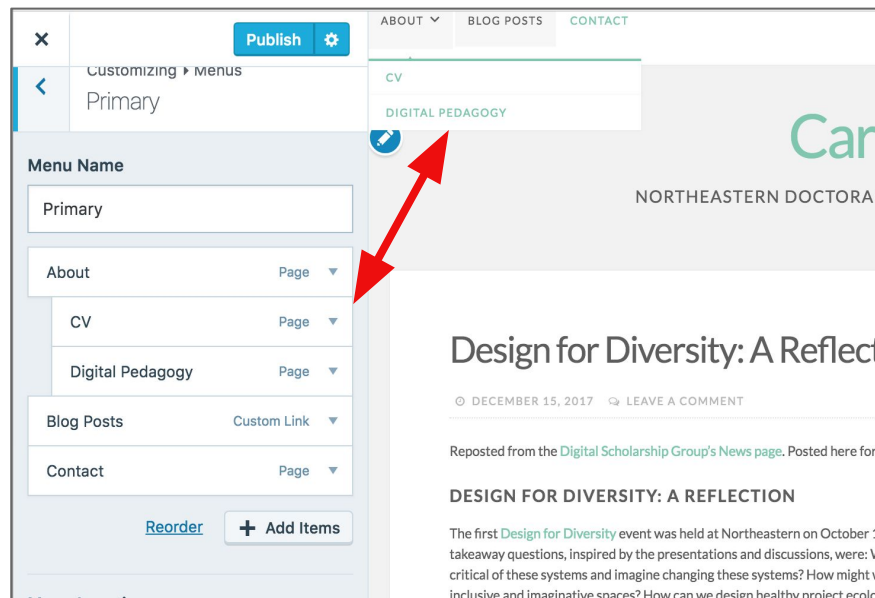


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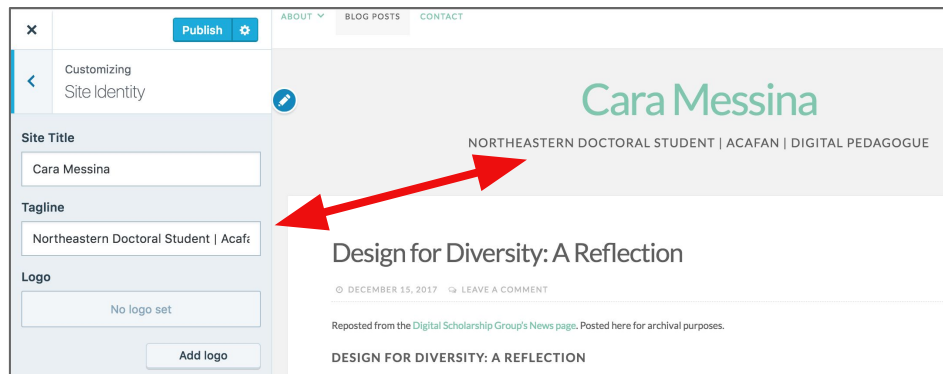
Customize Site Menu

- In the “Customize” page left-hand column, go to “Menus,” which will allow you to add pages, posts, and other content to the overhead menus
 - You can create subsections in the menu by sliding one page under another “parent” page.



Customize Header

- Your website, like all websites, should have a clear identity. The **header** and **subheader** can help with this. The header is the phrase/name that appears at the top of each page (the subheader, if applicable in your theme, appears below)
- You can change your header in “**Site Identity**” under the “**Customize**” menu.

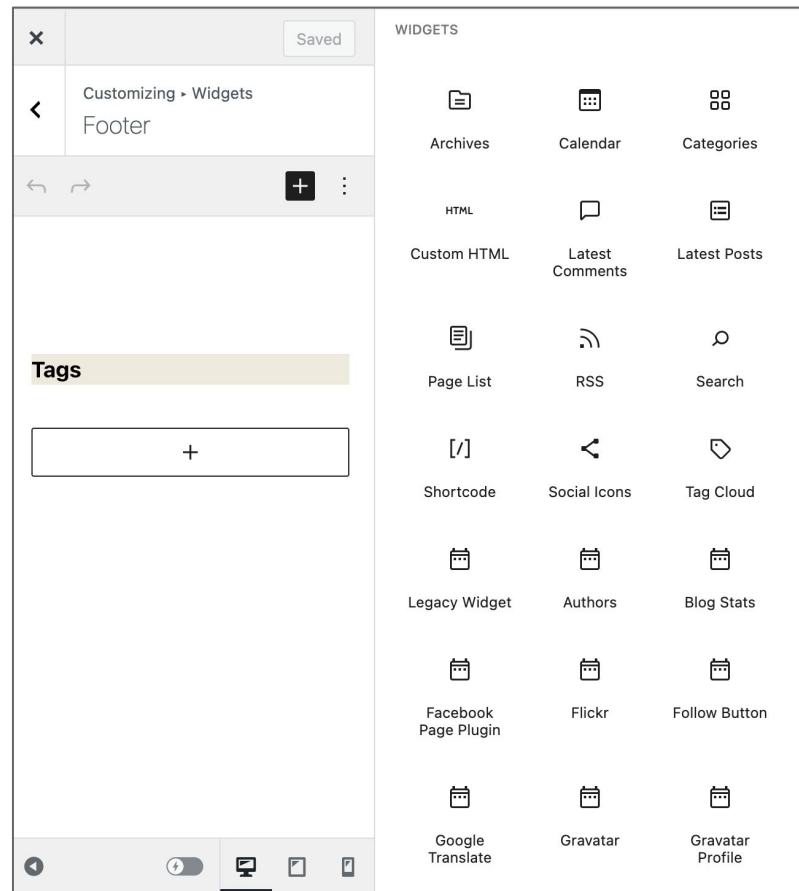


Add & Customize Widgets

- **Widgets** are small applications and components that appear in different places on your WordPress site
 - For example, a “Footer” widget will appear at the bottom of your website across the different pages. The widgets you put in “Sidebar” will appear in the sidebar.
- You can add any block to your site’s widget areas or use the classic Widget options.
- Add widgets by clicking the button under “**Appearance**” on the homepage or on the “**Customize**” page.

For more information on Widgets, see:

<https://wordpress.com/support/widgets/>



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Templates in WordPress



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What is a template in WordPress?

Templates—a prebuilt, pre-organized version of something—is a very useful tool to have when working with WordPress.

Depending on what Theme that your website is using, there may or may not be existing templates for different kinds of **pages**.

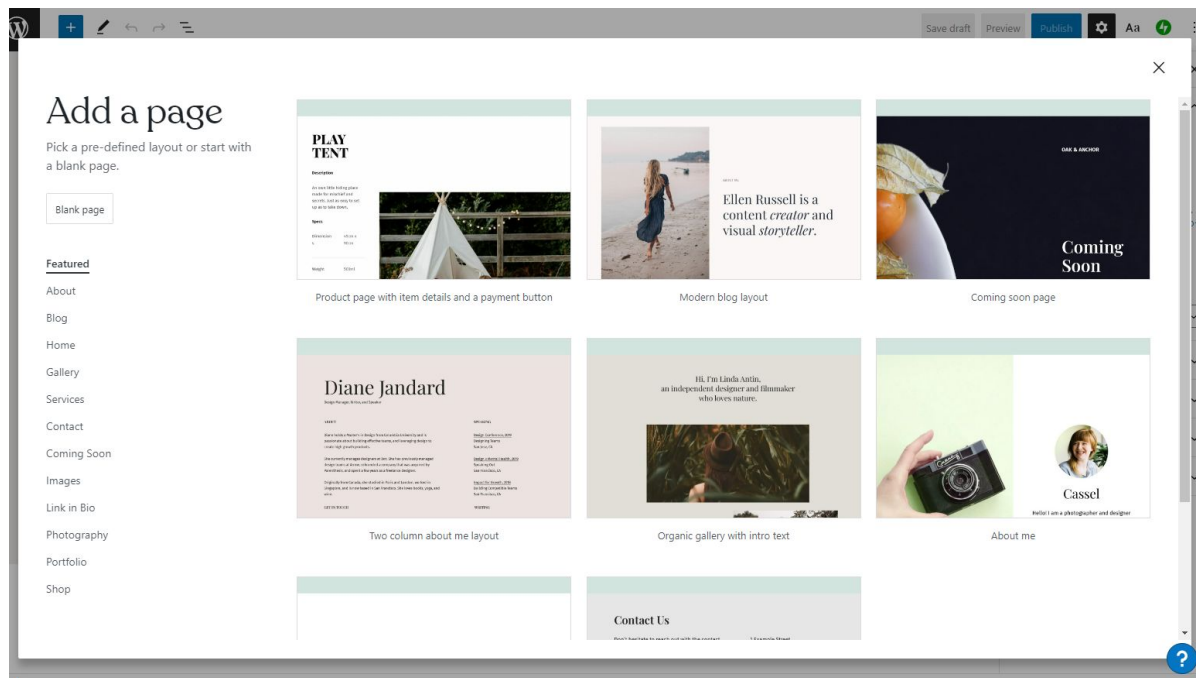
Think generically for parts of a website: about me section, contact us, home page, services, gallery, etc.



Page Templates in WordPress

When we select the “**Add New Page**” button, we can choose from predefined layouts or templates.

These pages were are generic templates that are associated with the theme we are using and with WordPress.



Creating Customized Templates

However, if there are specific **pages** or **posts** that will need to be updated regularly and need the same format, creating a generic template is helpful!

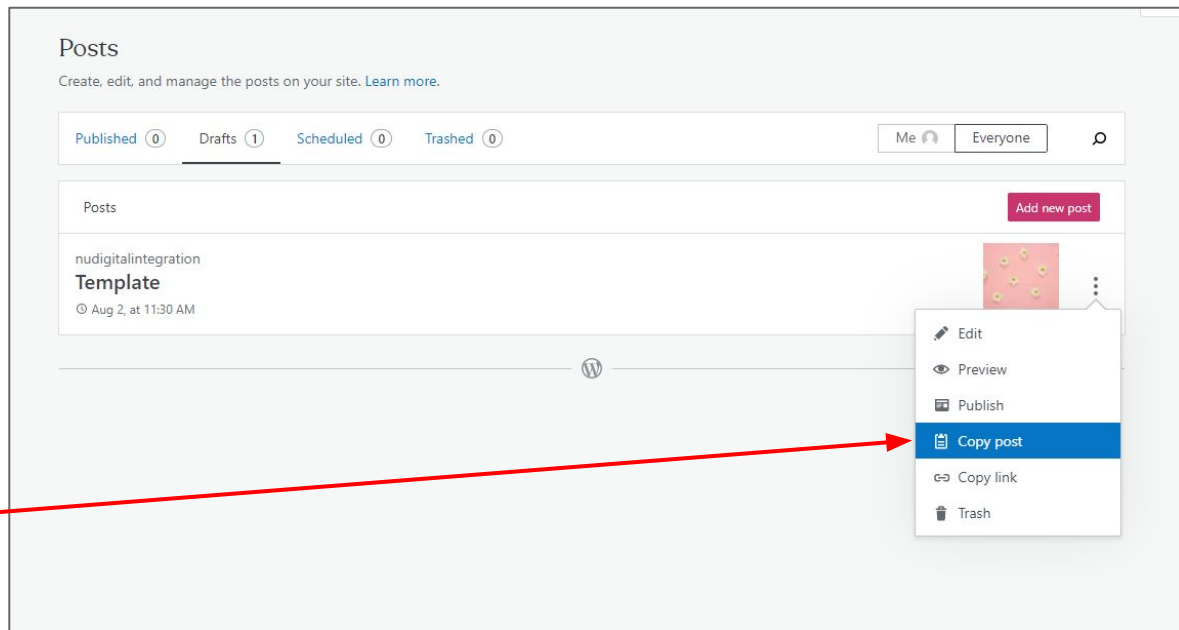
While you can just use the “**Copy**” feature for existing posts to duplicate the exact content and structure, creating templates as tutorials for a post or page layout is a more long-term solution.



Copying Templates from Drafts

If you create templates for pages or posts, they will exist in your **Drafts** section as they are unpublished.

To create a new post from a template, simply hit the **“Copy post”** or **“Copy page”** button to duplicate the template and start filling in your content.



Reckonings WordPress Demonstration



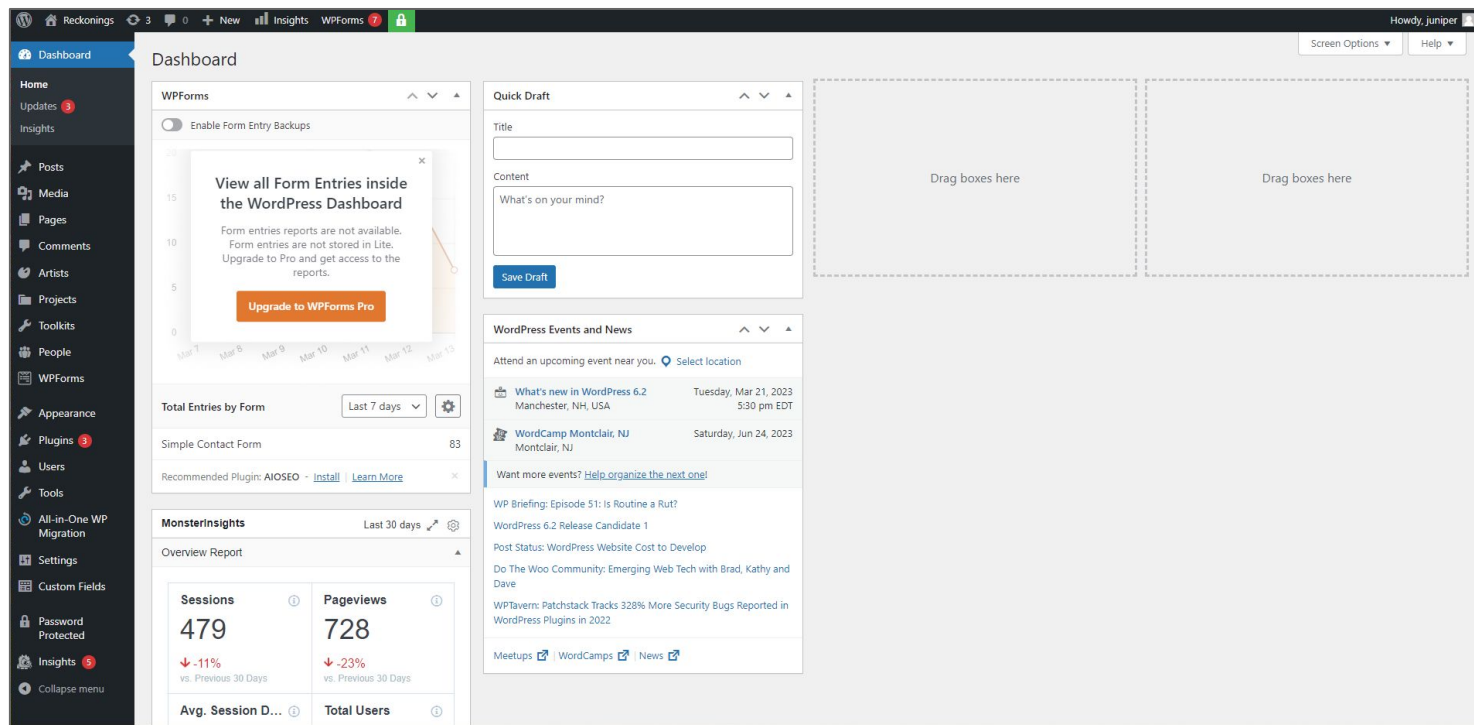
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Reckonings WordPress Dashboard



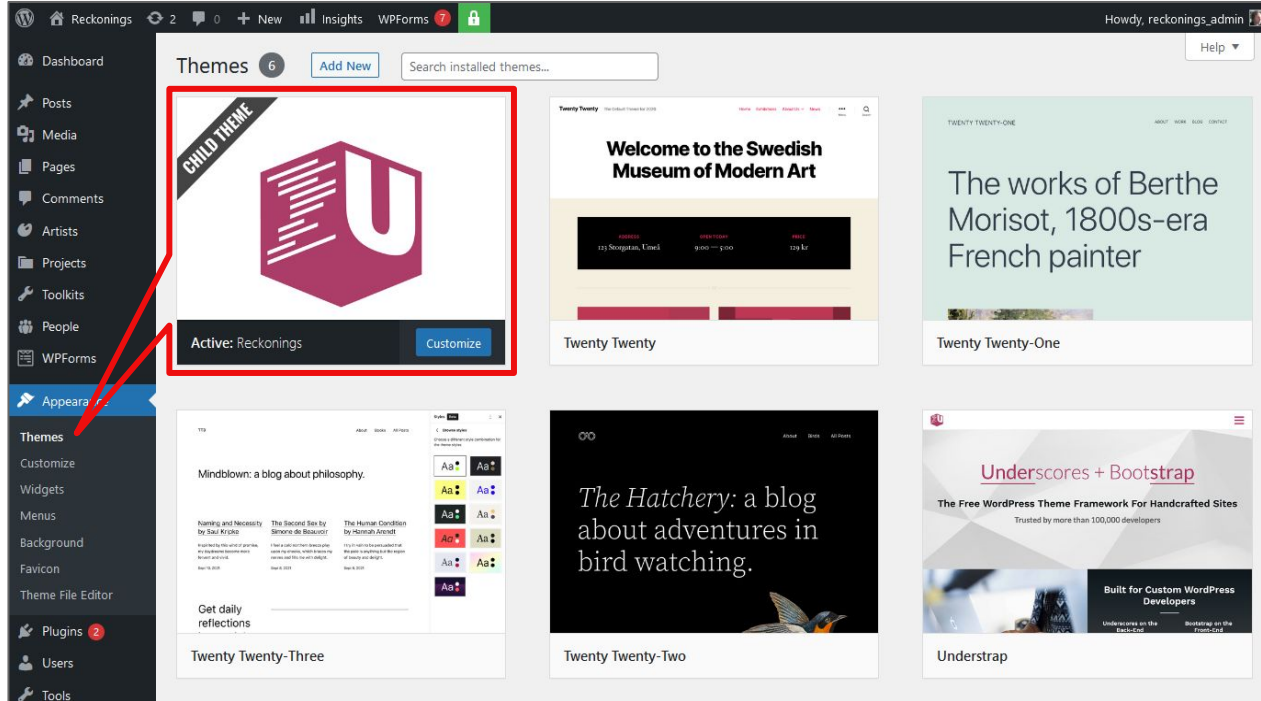
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Reckonings Themes



The Reckonings WordPress uses a custom **Theme**: this controls the design and layout of content.

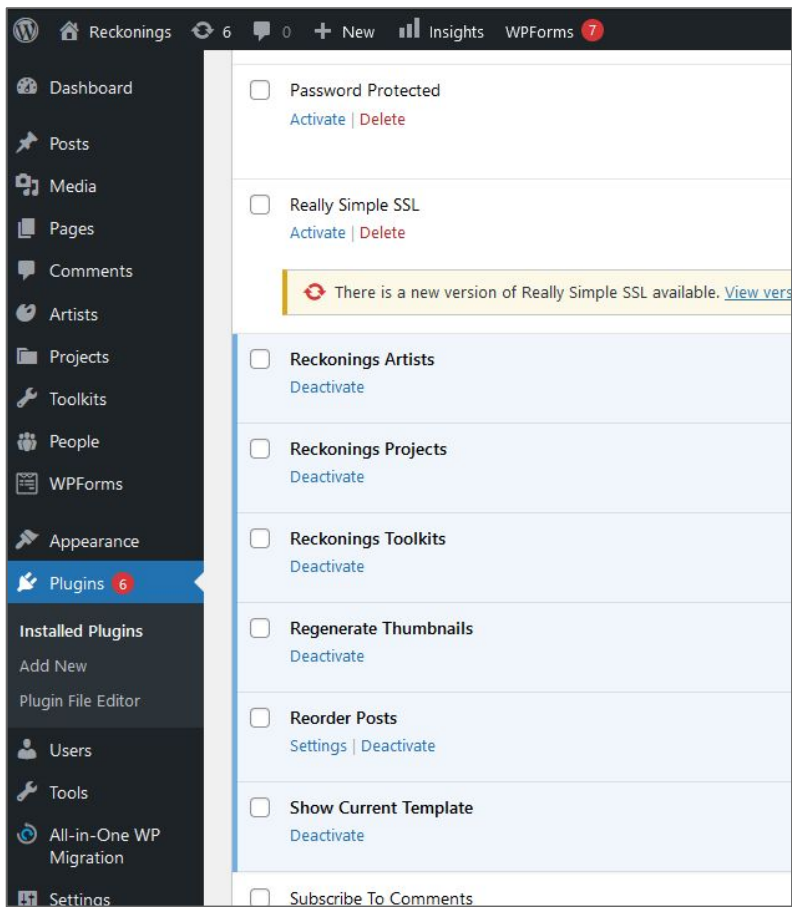


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Reckonings Plugins

The Reckonings WordPress also uses custom **Plugins**:

Adds custom functions like the types of data "People" and "Projects" and "Toolkits"



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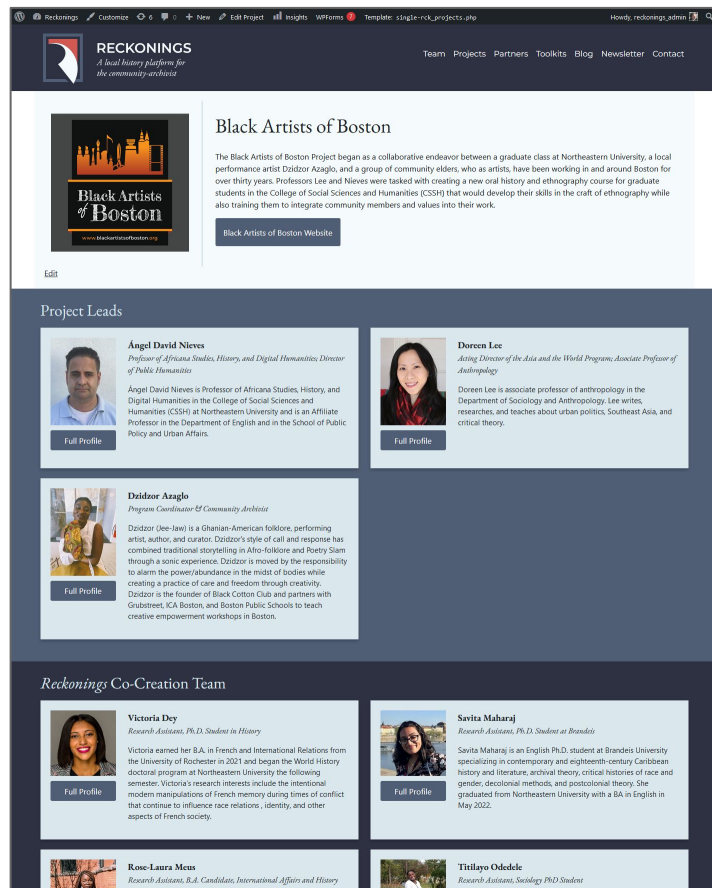


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Projects (front end)

An example plugin is "Projects," which adds a content type called "Project" that we can add for each of our Reckonings partner projects (Black Artists of Boston is a partner project of Reckonings)



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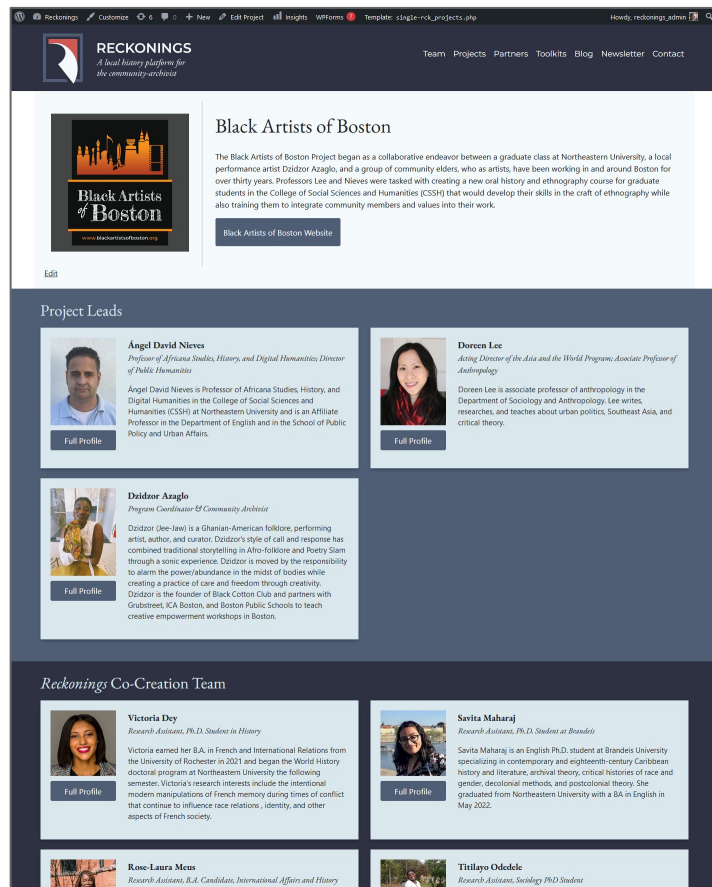


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Projects (front end)

The design of the "Project" page is determined by the Reckonings "Theme," which has custom code that has been set up to create the page layout and the design style of each "Project" page



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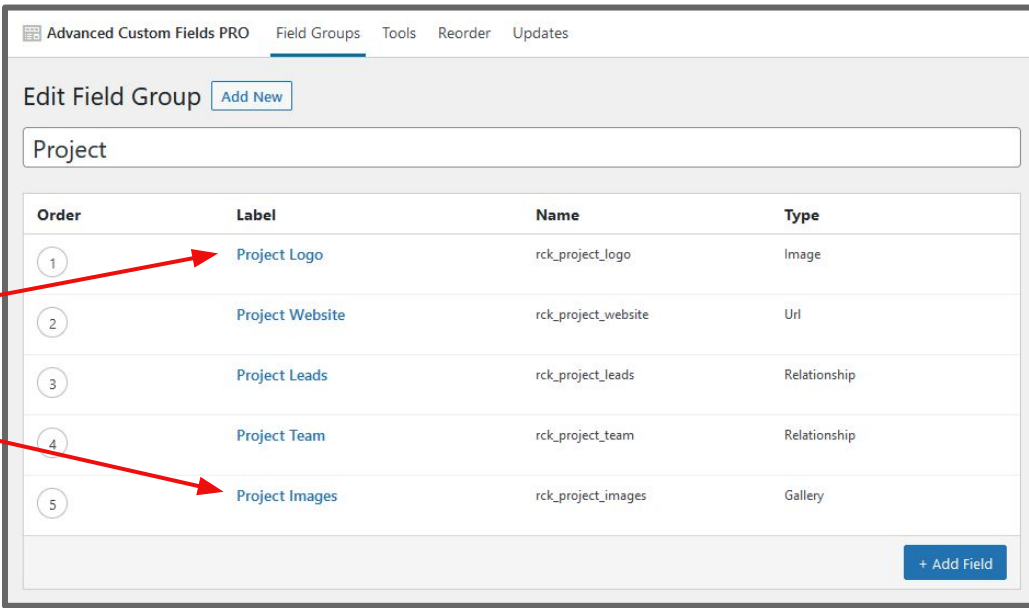


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Projects (fields)

For a custom content type like "Project," we can create a number of metadata fields



Advanced Custom Fields PRO | Field Groups | Tools | Reorder | Updates

Edit Field Group [Add New](#)

Project

Order	Label	Name	Type
1	Project Logo	rck_project_logo	Image
2	Project Website	rck_project_website	Url
3	Project Leads	rck_project_leads	Relationship
4	Project Team	rck_project_team	Relationship
5	Project Images	rck_project_images	Gallery

[+ Add Field](#)

Examples of these are: "**Logo**" (an image), "**Website**" (a URL), "**Project Leads**" (a list of people who direct the project), "**Project Team**" (another list of the staff members for that project), and "**Images**" (an optional gallery of images we can show on the Project page)



Projects (data)

Editing **Projects** is a similar process to creating a blog post or page on Wordpress

On the public display side, the theme file uses the data you fill in on the "**Project**" editor page to place your content into its layout

The screenshot shows the 'Edit Project' interface for 'Black Artists of Boston'. The form includes a permalink, a rich text editor with a paragraph about the project's origin, a word count, and an excerpt. Below these are sections for 'Project Logo' (with a placeholder image), 'Project Website' (with a URL), 'Project Leads' (with a search bar and a list of names), and 'Project Team' (with a search bar and a list of names). Red lines connect labels to specific fields: 'Project Logo' to the logo image, 'Website' to the URL field, 'Project Leads' to the 'Project Leads' section, and 'Project Team' to the 'Project Team' section.

Edit Project [Add New](#)

Black Artists of Boston

Permalink: <https://reckoningsproject.org/projects/black-artists-of-boston> [View](#)

[Add Media](#) [Add Form](#) [Add Post Awesome](#) [Visual](#) [Text](#)

Paragraph

The Black Artists of Boston Project began as a collaborative endeavor between a graduate class at Northeastern University, a local performance artist [Dorinda Acacio](#), and a group of community elders, who as artists, have been working in and around Boston for over thirty years. Professors Lee and Nieves were tasked with creating a new oral history and ethnography course for graduate students in the College of Social Sciences and Humanities ([CSSS](#)) that would develop their skills in the craft of ethnography while also training them to integrate community members and values into their work.

[Black Artists of Boston Website](#)

Word count: 99 Last edited by reckonings_admin on October 28, 2022 at 8:08 pm

Excerpt

Project

Project Logo

Project Website

<https://www.blackartistsofboston.org>

Project Leads

Select post type Select taxonomy

Search...

Allison Donnie
Anastasia Abraham
Anna Zhang
Calle Harrison
Doreen Lee
Eljah Miller

Angel David Nieves
Dorinda Acacio

Project Team

Select post type Select taxonomy

Search...

Allison Donnie
Anastasia Abraham
Anna Zhang
Calle Harrison
Doreen Lee
Eljah Miller

Victoria Gray
Savita Mathang
Rose-Laura Meiss
Tillayo Odeola
Shavawn Sutton
Veneria Torres

Project Logo

Website

Project Leads

Project Team



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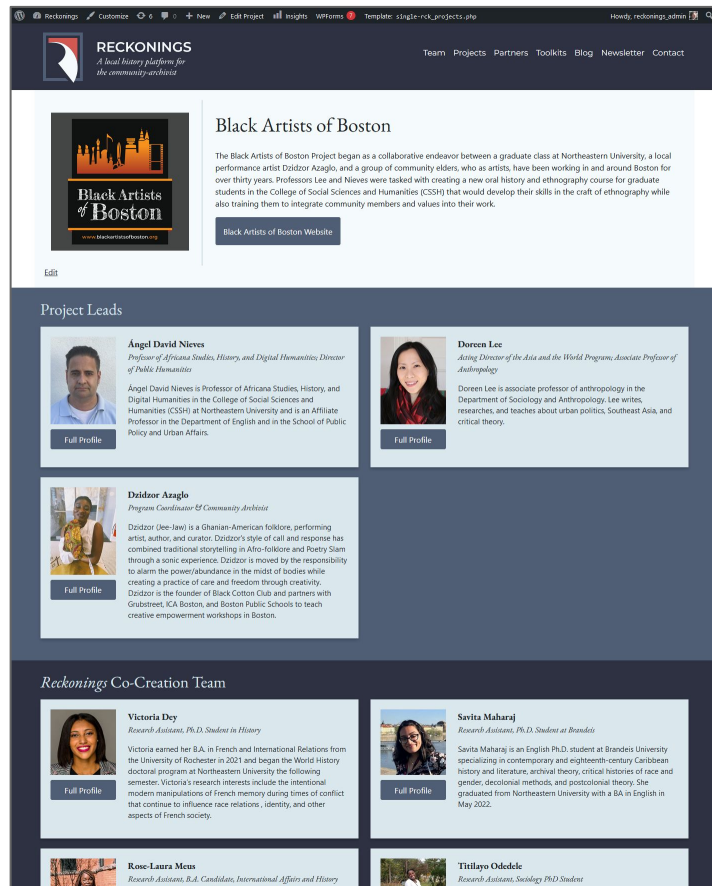
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Projects (front end)

Check out the reckonings website

Where do you see the metadata fields appearing?



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People Plugin (Front end)

The screenshot displays the front end of the RECKONINGS People Plugin. The interface has a dark blue header with navigation links: Reckonings, Customize, 6, 0, + New, Insights, WPForms 7, and Template: archive-rck_people.php. The user is logged in as 'Howdy, reckonings_admin'. The main content area is divided into two columns. The left column features a 'Project Staff' section with a profile for Greg Lord, Assistant Director of Design & Program Manager. The right column features a profile for Dgidzor Azaglo, Program Coordinator & Community Archivist. Below these, the 'Current Co-Creators' section shows profiles for Victoria Dey and Hunter Moskowitz, both Research Assistants and Ph.D. Students in History. Each profile includes a headshot, name, title, and a brief biography.

techniques and software tools, to the changing landscape of communication and publication.

Project Staff

Greg Lord
Assistant Director of Design & Program Manager

Greg Lord is a designer and developer with over 15 years of experience in digital humanities research and development. His previous experience includes the University of Maryland's MITH (Maryland Institute for Technology in the Humanities), Hamilton College's Digital Humanities Initiative (DHi), NASA, and the Aircraft Owners and Pilots Association (AOPA), having served in roles as a graphic/web designer, software engineer, 3D modeler, and virtual reality developer.

Dgidzor Azaglo
Program Coordinator & Community Archivist

Dgidzor (Jee-Jaw) is a Ghanaian-American folklore, performing artist, author, and curator. Dgidzor's style of call and response has combined traditional storytelling in Afro-folklore and Poetry Slam through a sonic experience. Dgidzor is moved by the responsibility to alarm the power/abundance in the midst of bodies while creating a practice of care and freedom through creativity. Dgidzor is the founder of Black Cotton Club and partners with Grubstreet, ICA Boston, and Boston Public Schools to teach creative empowerment workshops in Boston.

Current Co-Creators

Victoria Dey
Research Assistant, Ph.D. Student in History

Hunter Moskowitz
Research Assistant, Ph.D. Student in History



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Reckonings 6 0 + New Insights WPForms 7 Howdy, reckonings_admin

Dashboard Posts Media Pages Comments Artists Projects Toolkits People WPForms Appearance Plugins 6 Users Tools All-in-One WP Migration Settings Custom Fields Field Groups Add New Tools Reorder Updates Insights 5 Collapse menu

Advanced Custom Fields PRO Field Groups Tools Reorder Updates

Edit Field Group [Add New](#)

Person

Order	Label	Name	Type
1	Full Name	rck_person_name_full	Text
2	Last Name	rck_person_name_last	Text
3	Title	rck_person_title	Text
4	Portrait	rck_person_portrait	Image
5	Social Media	rck_person_socials	Clone
6	Online Profile Link	rck_person_profilelink	Url
7	Biography Instructions		Message
8	Role	rck_person_role	Select
9	Status	rck_person_status	Select

[+ Add Field](#)

Location

Rules
Create a set of rules to determine which edit screens will use these advanced custom fields

Show this field group if

Post Type is equal to Person [and](#)

or [Add rule group](#)

Publish

Status: Active [Edit](#)

Published on: May 31, 2022 at 15:02

[Move to Trash](#) [Update](#)

People Plugin (Fields)



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Reckonings 6 + New View People insights WPForms Howdy, reckonings_admin

Dashboard Posts Media Pages Comments Artists Projects Toolkits **People** People Add New Reorder WPForms Appearance Plugins Users Tools All-in-One WP Migration Settings Custom Fields Insights Collapse menu

Edit Person [Add New](#)

Screen Options

Greg Lord

Permalink: <https://test-reckoningsproject.org/team/greg-lord> [Edit](#)

Person

Full Name

Greg Lord

Last Name

Last name or single name by itself, used for alphabetical sorting


Lord

Title

Assistant Director of Design & Program Manager

Portrait

Square format, 300x300px or larger.



Social Media Item

	Social Media Platform	Social Media Link For "website" type, please include the name of the site in the Link Text field. (These will be filled in automatically for all other platforms.)
1	Website	Website https://www.gplord.com Edit X
2	Twitter	https://twitter.com/gplord Edit X

[Add Row](#)

Online Profile Link

Please include a full URL, including http:// or https://

MonsterInsights

☐ Exclude page from Google Analytics Tracking

Toggle to prevent Google Analytics from tracking this page.

[Show Page Insights](#)

★ This is a PRO feature. [Upgrade](#)

Publish

[Preview Changes](#)

Status: Published [Edit](#)

Visibility: Public [Edit](#)

Published on: May 31, 2022 at 17:26 [Edit](#)

[Move to Trash](#) [Update](#)

People Plugin (Data)



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RECKONINGS
A local history platform for
the community-archivist

*Feel free to ask questions at any point
during the presentation!*

Class Activity: Create a “People” Profile

Create a new profile for yourself under the People section:

1. Login in to the Reckonings WordPress Demonstration site:
<https://test.reckoningsproject.org/wp-admin/>
2. Navigate on the left-hand side menu to the icon for “People.”
3. Click the “Add New” option.

Save a draft of your profile and then preview it on the website. Consider:

- What do you notice?
- How does the template work visually on the website?
- If you have WordPress experience, how does the Reckonings Project template compare to the default editor?



Documentation + Troubleshooting



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Why is documentation important?

When working with any digital tool or on a website with multiple users, there are going to be routine tasks or questions that you have to answer now and in the future.

Just as there are editorial guidelines or a submission process for a journal, website work has a **workflow**—the steps you or your team take in creating, editing, and publishing web content to your website.

Documenting the work involved in your individual and group **workflows** in a centralized document, folder, or repository (Google Docs, Google Drive, GitHub) will help all users be able to reference it after it has been covered!



How do I create documentation?

Documentation does not have to be intimidating though it often conjures images of technical manuals. Here are some examples:

1. **Team Google Drive:** create a centralized folder that is sharable with all your organization or team working documents, from meeting agendas to where you are keeping track of future tasks.
2. **Website Documentation Guide:** create a Google document where you keep all the notes and directions related to your website. This can include directions for creating specific posts, guidelines for content, or information about website maintenance.

TIP: When working in academic positions that involve high graduate and undergraduate student turn over or onboarding, write your documentation for a new audience, not just for yourself.



WordPress Documentation

Speaking about documentation, WordPress has an extensive set of documentation for how to use the platform:

<https://wordpress.org/support/>

When you are using any digital tool, familiarize yourself with the tool's documentation. You are bound to have questions and knowing what is available will make troubleshooting easier!



Useful WordPress Documentation

Here are some helpful pages in the WordPress Support pages:

- [Getting Started with WordPress](#)
- [Updating WordPress \(latest version\)](#)
- [WordPress Glossary](#)
- [Working with WordPress FAQs](#)
- [Common WordPress Errors \(troubleshooting\)](#)
- [Backing up WordPress](#)



Questions?



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Thank you!

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If you have any questions, contact DITI at nulab.info@gmail.com

Slides, handouts, and data available at:

<https://bit.ly/sp23-nieves-lee-insh5602-wordpress>

Have questions? Schedule an appointment with us! calendly.com/diti-nu



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