

OAHS Website Training Guide

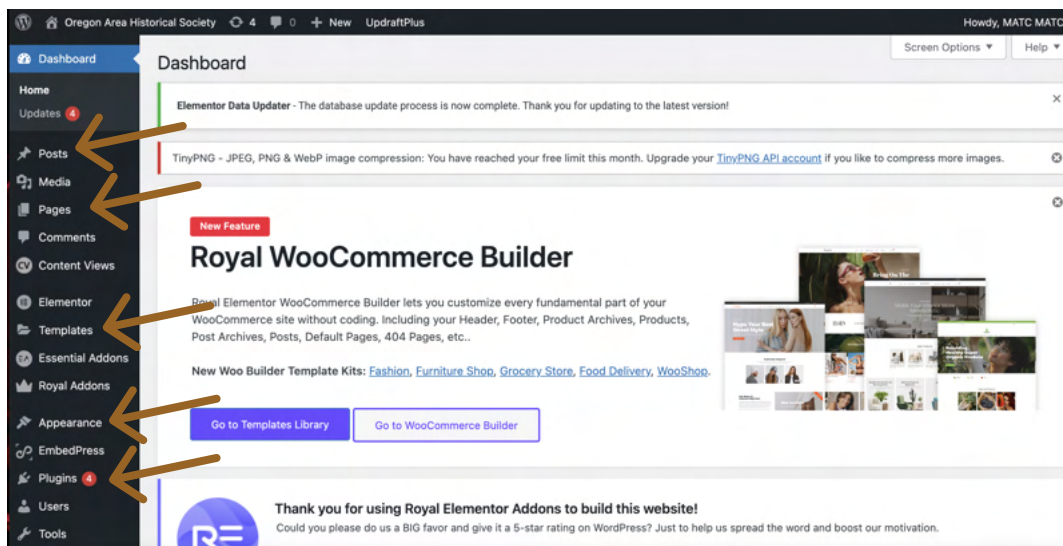
Miranda Smith, Mackenna Bauman and Mat Adams

12.15.2022

Let's get started!

Wordpress Dashboard

This is your home base for everything you need to do. This is where you'll manage posts, pages, templates, plugins and site settings - to name a few. When in doubt come back to this screen and look through this menu.



Posts Vs. Pages:

In a nutshell, pages are used for static content, whereas posts are for more timely content that is regularly updated, like blog posts & your This Month in History articles. Pages, on the other hand, are great for creating the structure of your site, the pieces within each page might change, but the page itself will stay fairly consistent over time.

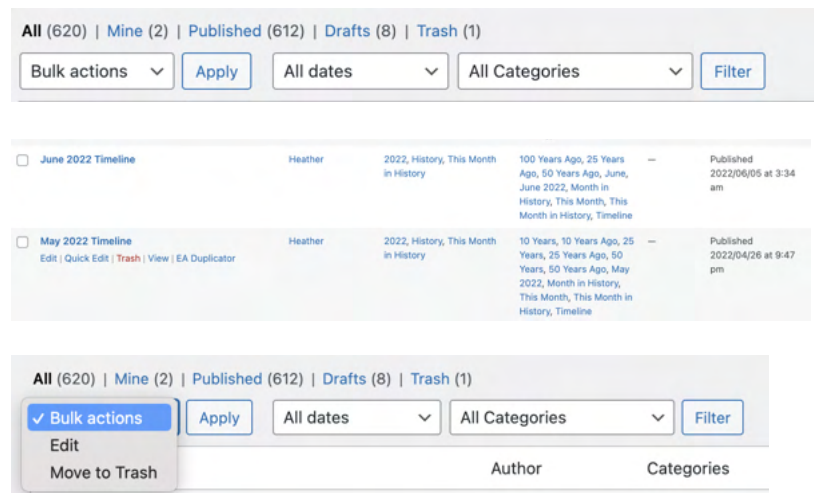
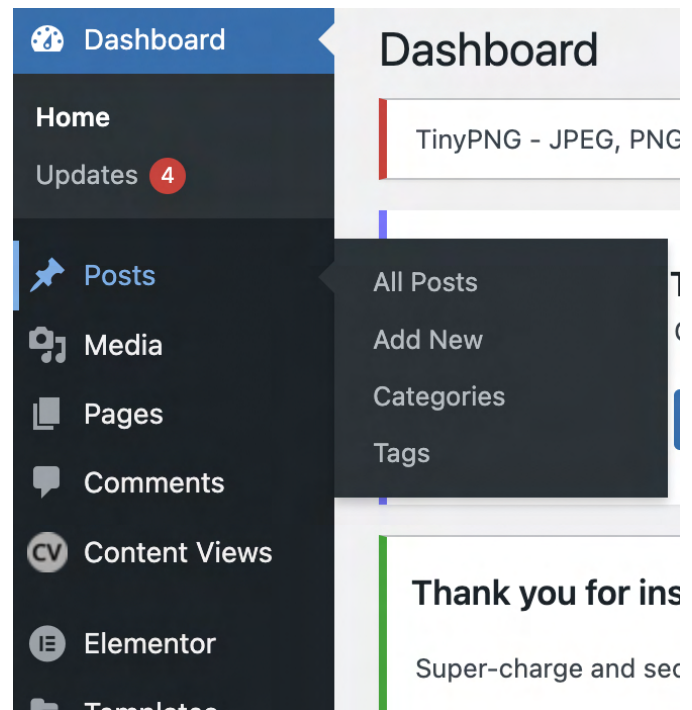
Posts

1. The post icon is a pushpin located near the top of your left toolbar. Click the icon to view your post option.
 - a. All Posts: Selecting this will take you to the archive of all your previous posts. Within this section, you can search for specific posts, edit single posts, bulk edit metadata for multiple entries, and delete posts.

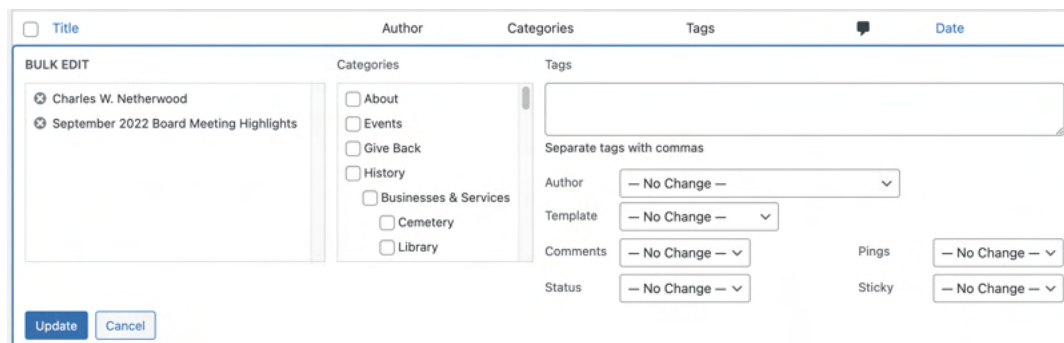
Add New: This is how you can create new posts.

Search Posts: You can find specific posts in a variety of different ways. You can use the search bar in the upper right. You can also click through the page by clicking through pagination using the arrows. You can use the drop-down bars in the upper left to filter out content by date and/or by specific category.

Edit Single Post: This is a great place to access and edit posts. You can edit a single post by hovering over the name of the post you want to edit and selecting edit or edit in Elementor. I recommend selecting the edit option if you want to change metadata information and the Elementor option if you plan on editing the content.



Edit Bulk Content: You also have the option to edit multiple posts at the same time. Simply select the posts you want to edit by clicking on their checkboxes and using the bulk actions drop-down. You can edit post metadata by selecting edit or delete an item by moving it to the trash. Once you choose your action, select apply.

The screenshot shows the WordPress Bulk Edit interface. At the top, there are tabs for 'Title', 'Author', 'Categories', 'Tags', and 'Date'. The 'Categories' tab is currently selected. On the left, under 'BULK EDIT', there is a list of two posts: 'Charles W. Netherwood' and 'September 2022 Board Meeting Highlights', each with a checkbox. In the center, there is a 'Categories' section with a list of categories: 'About', 'Events', 'Give Back', 'History', 'Businesses & Services', 'Cemetery', and 'Library', each with a checkbox. On the right, there is a 'Tags' section with a text input field and a dropdown menu. Below the input field, there is a section for 'Separate tags with commas' and a dropdown menu. At the bottom, there are buttons for 'Update' and 'Cancel'. The 'Update' button is highlighted in blue.

Bulk Edit: When you select edit from the bulk actions option, this display will appear. The window on the left shows your selected posts. You can click the x to remove any unwanted posts if needed. The categories section allows you to select categories for your posts. Categories are how you can organize your posts into specific areas. For example, we created categories for the main history sections so that the posts related to them could all be filtered to the correct page. In the last area, you can add tags that help with search engine optimization and searches within your site. There is some debate on whether this is necessary or not, but it doesn't hurt; just note that the tags will appear at the bottom of the post if you decide to include them. You can also change things like the author, commenting option, and post status in the area. When you're done, select update.

Trash: The trash action will move the posts into a trash holding area that you can access by selecting the trash link from the option above the dropdown bars. The posts will live in the trash until you either permanently delete the items or restore them. You can use the bulk action dropdown in the trash to complete either option.

New Post:

- **Add Title:** Now that you are on the new post page, the first thing you'll want to do is add a title. Once you have added a title, you will be able to publish your page, but I suggest doing a few other things first.

- **Add Categories:** Categories are used to help filter the correct posts to the right places. It's what we used to make sure the correct type of post is being displayed on the pages of the history sections. For example, if you are writing a post for This Month in History, you'll want to select these categories: History > This Month in History > 2022 by doing this, it will auto-display your new post in that area and archive the last one.

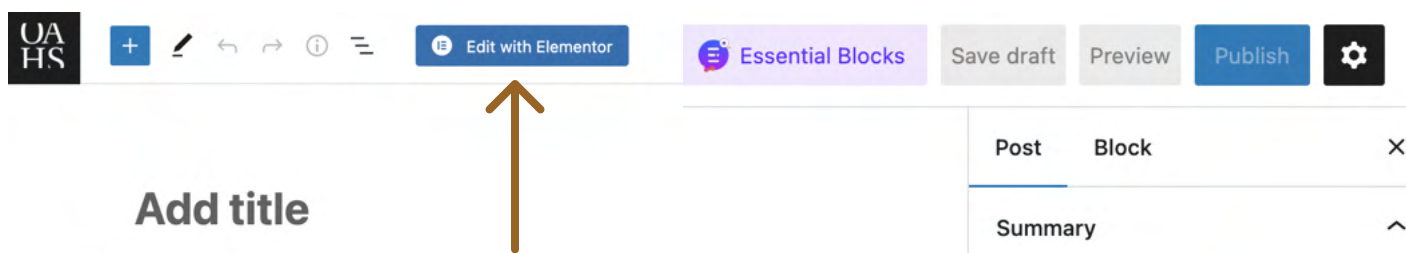
New Category: Sometimes, you'll need to create new categories; for example, it will be 2023 soon. To do this, you select the Add New Category option. This will open up some new options. Going with the 2023 example, start by adding 2023 to the New Category Name box. Then you'll want to select the Parent Category for the item; in this case, it will be This Month in History. Then select the Add New Category button; this will add your new category to the available options to select.

Add Tags: A WordPress tag is one of the default tools you can use to categorize your WordPress posts. Each post can contain multiple tags, and visitors can click on a tag to find similar posts that have that same tag. Unlike categories, tags are completely optional. That is, you're free to add WordPress tags to your post, but you can also publish a post without tags. The choice is yours! To create a tag, type a word or phrase and separate it with commas. Just be aware that the tags will appear at the bottom of the post.

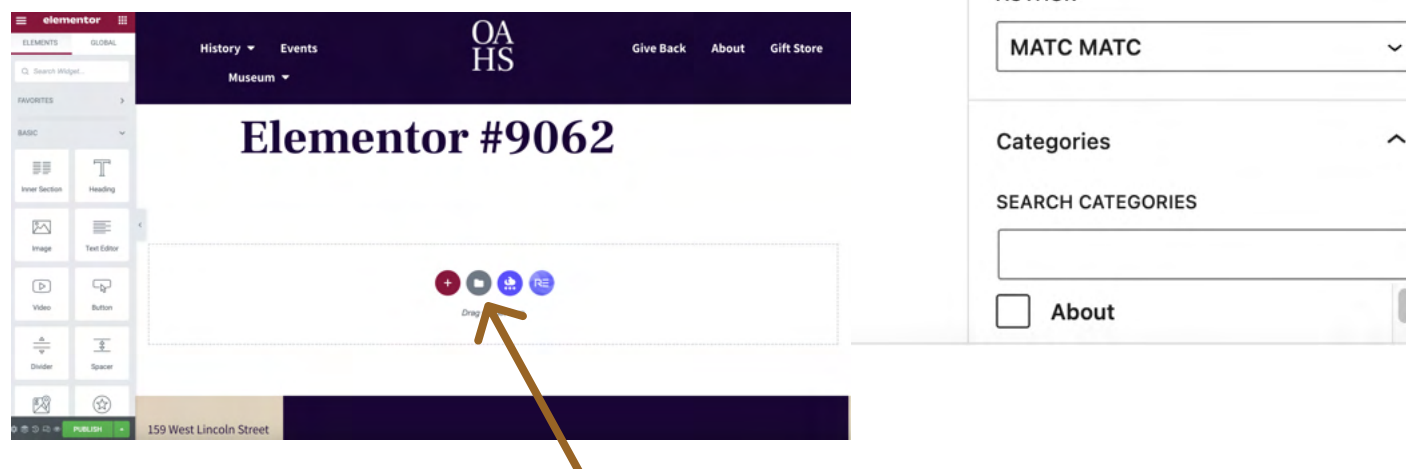
Select Feature Image: Featured images will appear as a preview of the article. For most websites, I would suggest using featured images on your posts. However, this gets a little tricky on your site because you're pulling from so many different image times and formats.

Add Excerpt: This is a nice-to-have feature that is again up to you if you want to include it. The excerpt will be a little preview of what the article will be; however, if you don't write, one will be automatically generated for you.

Discussion Options: In this area, you will find two options, Allow Comments and Allow Pingbacks & Trackbacks. I suggest leaving both unchecked. Commenting requires some level of moderation and was previously enabled on your site but not utilized by users, so we removed the option from previous posts. Pingbacks and trackbacks are link notifications that enable you to keep track of when other sites link to your content. When these notifications are enabled, they appear in the comments section of your posts. This feature isn't necessary for a site your size.



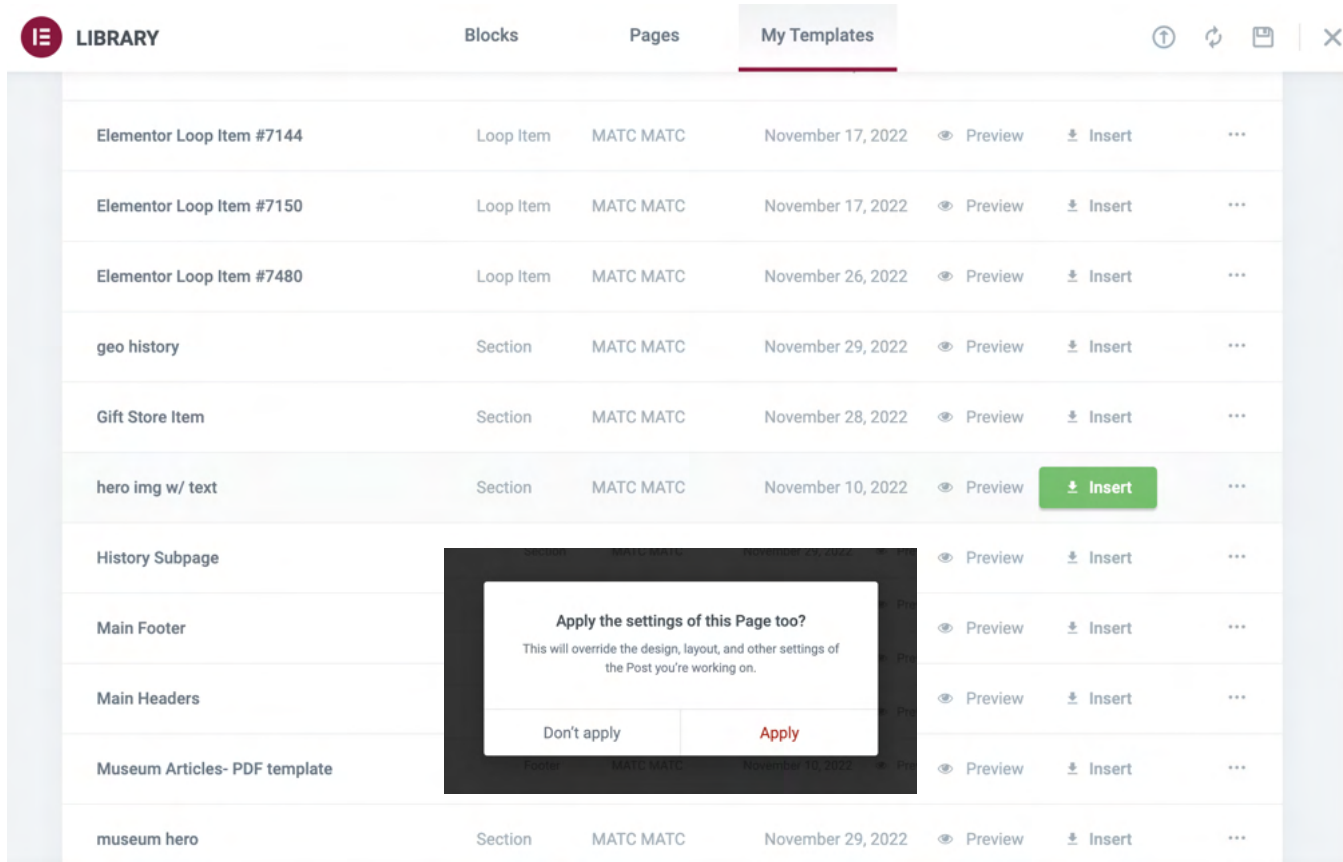
Elementor: Once you have completed the above elements, press the Edit with Elementor button. This will take you to a new page view that allows you to format your content. I recommend creating all the content of your post in this area.



Templates

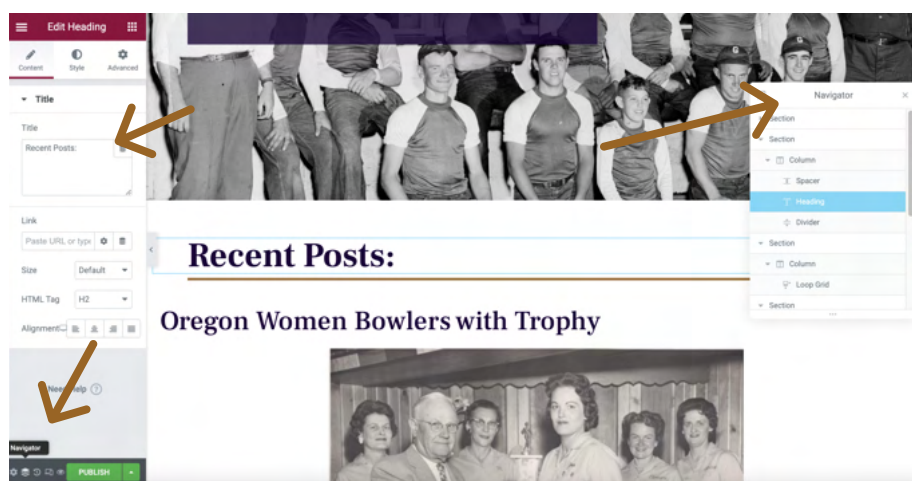
Using Templates: I recommend using one of the templates we designed for you to format your information. To use a template, select the gray file folder option.

My Templates: You'll then want to navigate to my templates tab. From here, you'll have a few options for blog post types: Blog Post: General, Early Settlers: Bio, This Month in History: Post. For this example, I am going to select the This Month in History: Post option. Simply select the type you want and press the insert button to the right of the screen. Once you select insert, you will get a pop-up telling you that it will override some settings, go ahead and hit apply.



Editing Templates: We created the templates using real information so you can see exactly how to fill them. You'll want to go through the sample and update the information. You can do this by clicking on the section and typing either in the main area or in the content box on the left. If you're copy-pasting, you'll want to use the content box so that it doesn't override the formatting. You can also edit photos by clicking on the image and then, once it appears in the left menu hovering over the image and selecting a new image. From this area, you can upload a new image or select one that is already uploaded.

Navigator: on the right of the above screen, you will see a bar that has various sections and elements; this is the navigator. If you're not seeing this column, you may need to pull it up by selecting the stack icon at the bottom of the Elementor column.

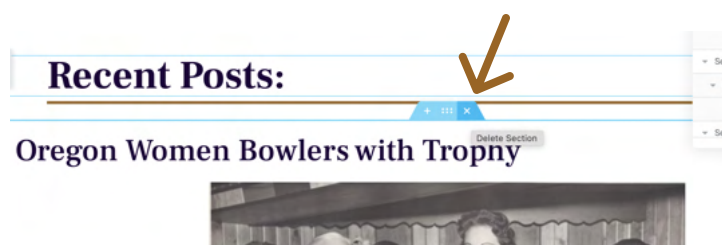


Using the Navigator: the navigator is a great way to identify, organize, and duplicate sections. Each section holds different information blocks created through widgets such as headers, images, & blocks of text. When you click on a section of an element, it will highlight it in the content area and vice versa. This can be particularly handy when you want to move something or duplicate a content box.

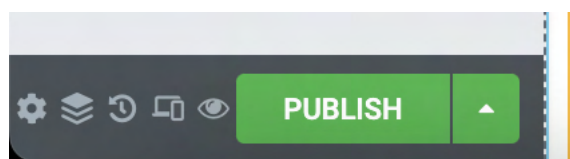
Moving: to move a content block, simply select the section holding that element and move the section up or down in the navigation column. Command Z will undo a move if needed.

Duplicate Section: You can also duplicate a section, which can be very helpful if you need an additional section or even just more of a particular section format. To duplicate a section right click and select duplicate. The duplicated section will appear right under the original.

Delete Section: The easiest way to delete a section is to pick the section in the main area and hit the x. You can use Command Z if you need to undo it if you delete something by mistake.



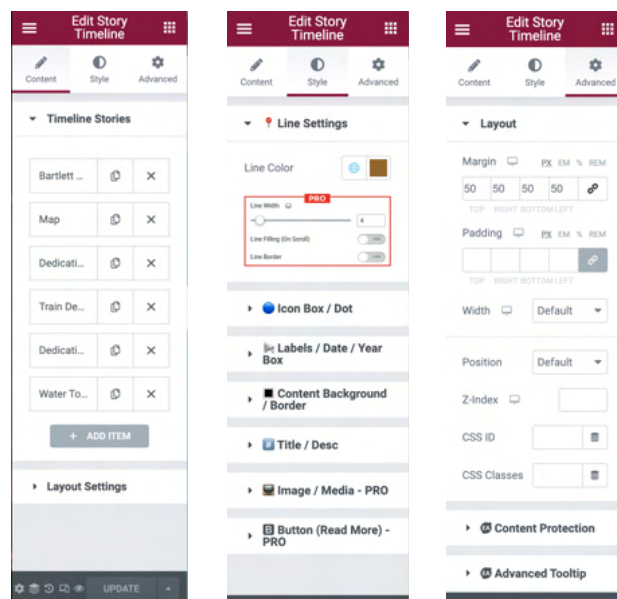
Quick Tip: Make sure you're occasionally hitting the PUBLISH button as you're working, so you don't lose your progress.



History Pages

Timeline Widget Plugin: On the main history page, you will find the timeline. This was made using the Timeline Widget for Elementor.

Editing Timeline: If you want to edit the timeline the first thing you'll want to do is click on the timeline in the main section. This will pop-up content blocks in the Elementor content editor screen. You will be able to edit a few things right in the main page view, but the majority of changes will be made in that content area.

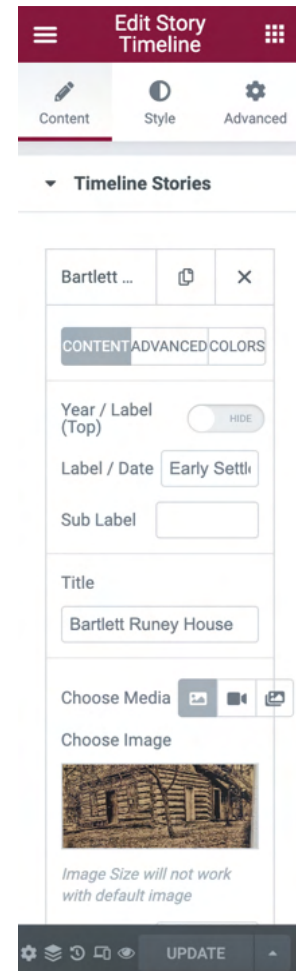


Select Section: In the Elementor content editor, select a section to edit the info. Once selected, you'll be able to edit any of the content above. You can also move the order the information is shown by dragging the sections into different orders in this area.

Add Item: Click the add item button to add to your timeline.

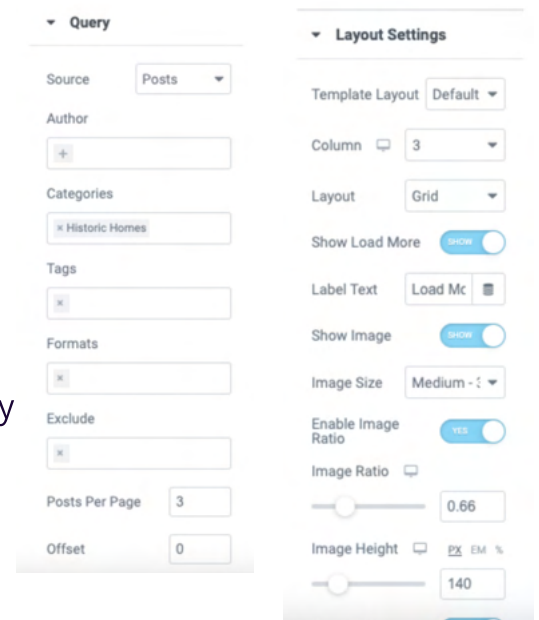
History Subpages: The history subpages serve as a place to showcase the posts pertaining to that subject. If you decide to build more subpages for the history section, you can find a History Subpage template in the template file.

Editing a History Subpage: The history subpages present posts in 2 ways. The first way in the Recent Posts: section highlights the newest post in the category. The Explore More area shows an archive view of additional posts with a load more button. Some of these explore posts may feature pictures, while others are just text. This depends on if the post has a featured image selected or not. To edit these sections, select the information block from the main page area or from the navigator.

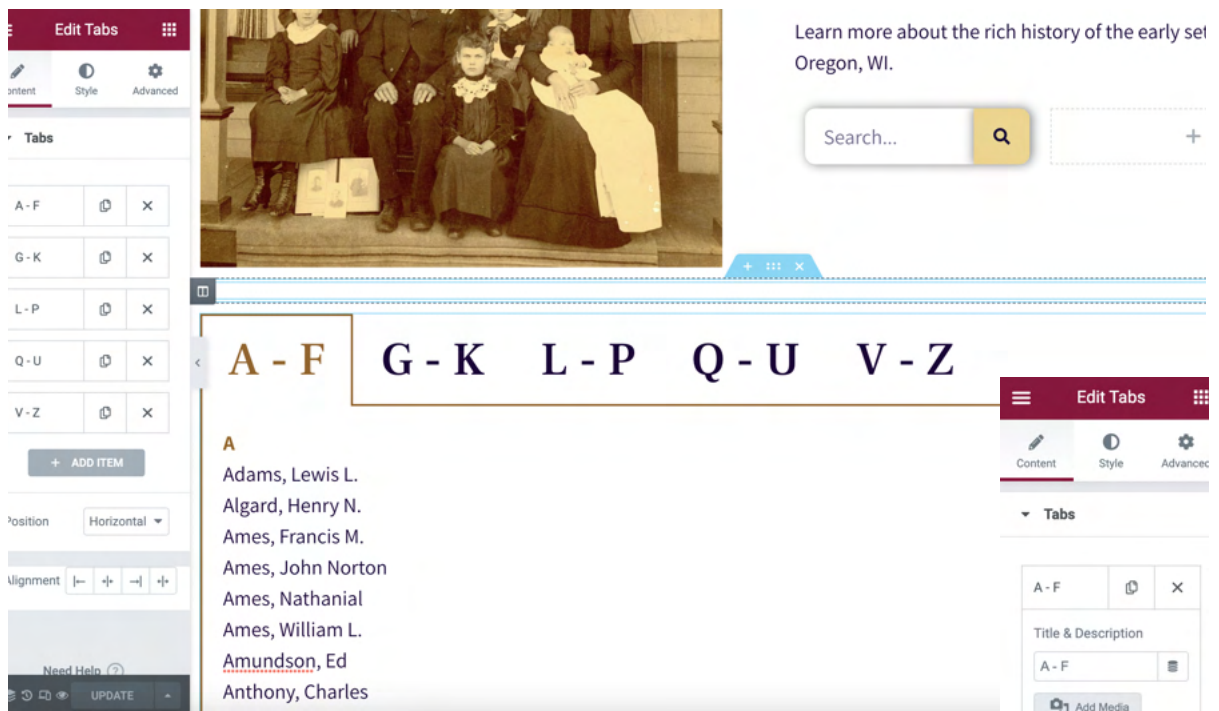


Query: The query filters the posts to determine what to display. If you leave these areas blank, the default will be to display the most recent post(s). You can filter what is displayed by Author, Categories, Tag, Etc. I think the best approach is to filter by category for these subpages.

Adding or Editing Categories: To add a category, simply type the first three letters of the category name into the form field, and it will search for matches. To remove a category, select the small x next to the category name.

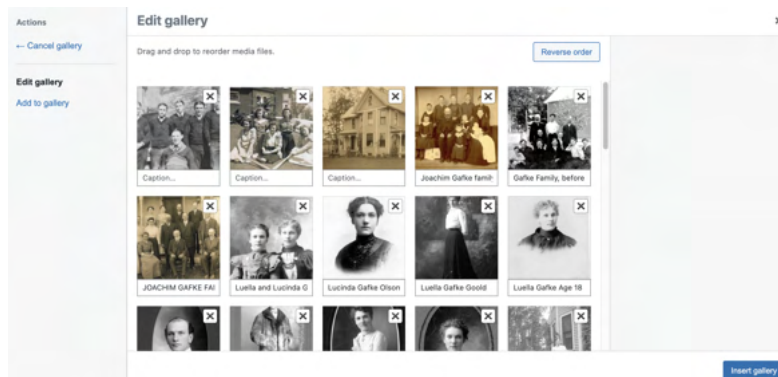


Layout Settings: You can also make adjustments to the layout settings in this area.

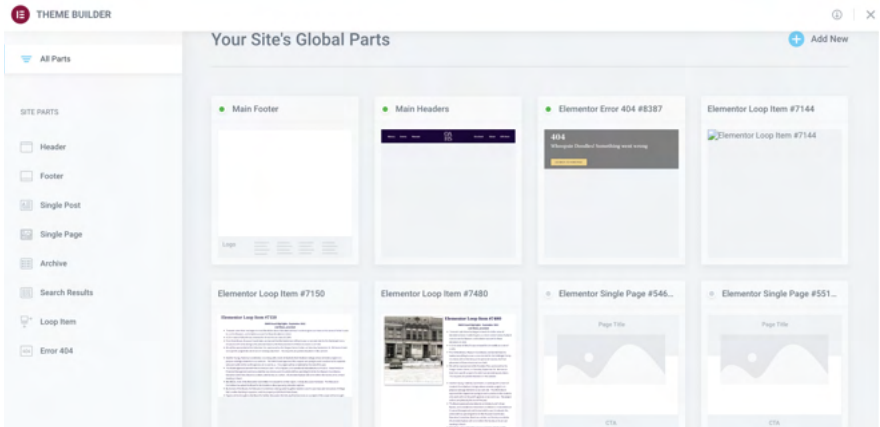
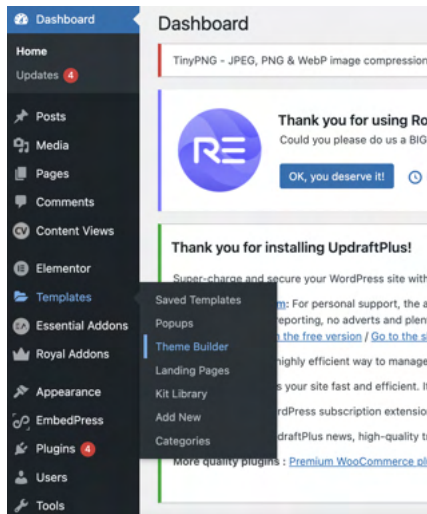


Tabs Widget: On the main Early Settlers Page, you will find the tabs feature. This is a great approach for displaying long lists of information. To edit this section, click on the element in the main area, and the tabs option will appear in the Elementor column. This section will be very similar to the timeline widget, where you can edit the text in the main area, but it might be easier to copy and paste things into the content editor on the Elementor column. To access each tab section, just click on the appropriate subject from the left content area.

Portrait Gallery: On the portrait gallery page, you might want to add or remove images from the gallery. Simply click an image in the gallery, and you will see the settings area in the Elementor column. If you click on one of the images within the setting area, you will be taken to the photo gallery editor, where you can add or remove items or drag the pictures to change their order. Once you have made the adjustment select the insert gallery option. If you decide you do not want to change anything, hit the x to edit this gallery panel.



Themes



Header:

If you're wanting to change/ or just view the design of your header you would first go to: Templates > Theme Builder (In theme builder you'll see all of the templates we have created for you) > Header > Main Header > Edit. From there you'll see that there are two different headers, one for desktop, and one for tablet/mobile. From this page you can edit colors, fonts, and change what menu items/menus show up.

Footer:

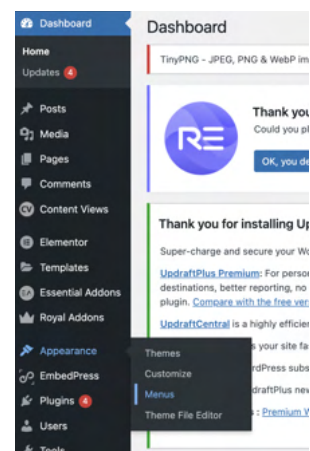
If you're wanting to change/ or just view the design of your footer you would first go to: Templates > Theme Builder (In theme builder you'll see all of the templates we have created for you) > Footer > Main Footer > Edit. From there you'll see that there are two different footers, one for desktop, and one for tablet/mobile. From this page you can edit colors, fonts, and change what menu items/menus show up.

Menus:

If you're just wanting to change the content/information of your menus, for example you created a new history page and want it show up under your history dropdown menu, you would go to:

- **Add Menu Items:** This would list all of your pages, posts, categories, and any custom links that you might want to add to your menus. You can search directly, or just click and add.
- **Menu Structure:** This allows you to order and arrange your menus however you would like. You can also delete any elements you don't want from here.

Manage Locations: Manage locations allows you to choose what menu is your main menu on your header and what menu you would like to show up on your footer. Currently set as:



Theme Location	Assigned Menu
Header	<div>Nav Menu ▼</div> Edit Use new menu
Footer	<div>Search ▼</div> Edit Use new menu

Save Changes

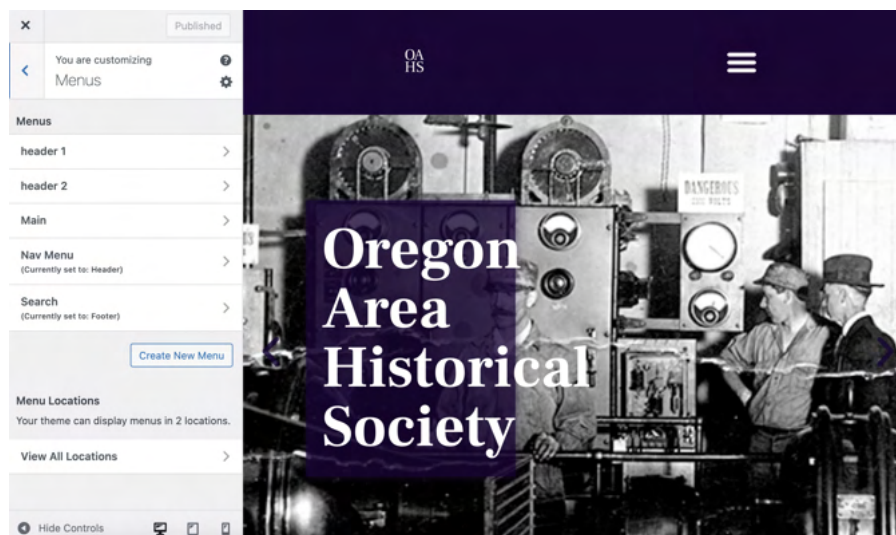
Note

Because your header/navigation has the logo inbetween it, it's been split up into two menus: Header 1 & Header 2. So if you were to want to edit you would either change Header 1, Header 2, &/or Nav menu. Header 1 & Header 2 are only used for Desktop view, Nav Menu is used for Tablet & Mobile view. If you add/or remove any pages in one menu, you'll have to also do it in the other.

You can also edit your menus by going to:

Appearance > Customize > Menus

This shows you all the menus you've created, as well as what each menu contains. You can click on each menu individually and add or remove any other posts, pages, etc. You can also change the location of your menus here.



Museum- Exhibit Archive

The Exhibit Archive allows you to keep track of any old or new exhibits. By using a tab system users can look at the different exhibits and pictures, without getting taken to an entirely different page. Currently just Geographical History and Native American, are the only two tabs filled out. For responsive purposes there are two different kinds of tabs, there's a horizontal one for desktop, and a vertical one for tablet and mobile. If you make changes/edit one you will have to do the other as well, but it should all be exactly the same.

Geo History	Native American	Lead Trail	Schools	Living
-------------	-----------------	------------	---------	--------

Oregon is located in the vicinity of the Johnstown moraine, the terminal moraine from the last major glaciation, which started to retreat about 20,000 years ago. The moraine forms a prominent topographic feature running south and west of Madison, and extends north over the Baraboo Hills and up to Antigo.

When the climate warmed about 15,000 years ago, the glaciers started to retreat, leaving distinctive landforms in part of Dane County.

Geological graphicPollen grains preserved in basins like Hook Lake, near Oregon, and Lakes Wingra, and Mendota record the changes in vegetation that took place as the landscape changed: Sphagnum gave way to sedges and grasses and deciduous forests replaced spruce.

As the glaciers retreated, big game animals like mammoths and mastodons migrated northward. We don't have any remains of these big animals near Oregon, but they have been found in Wisconsin.

To add a new Tab:

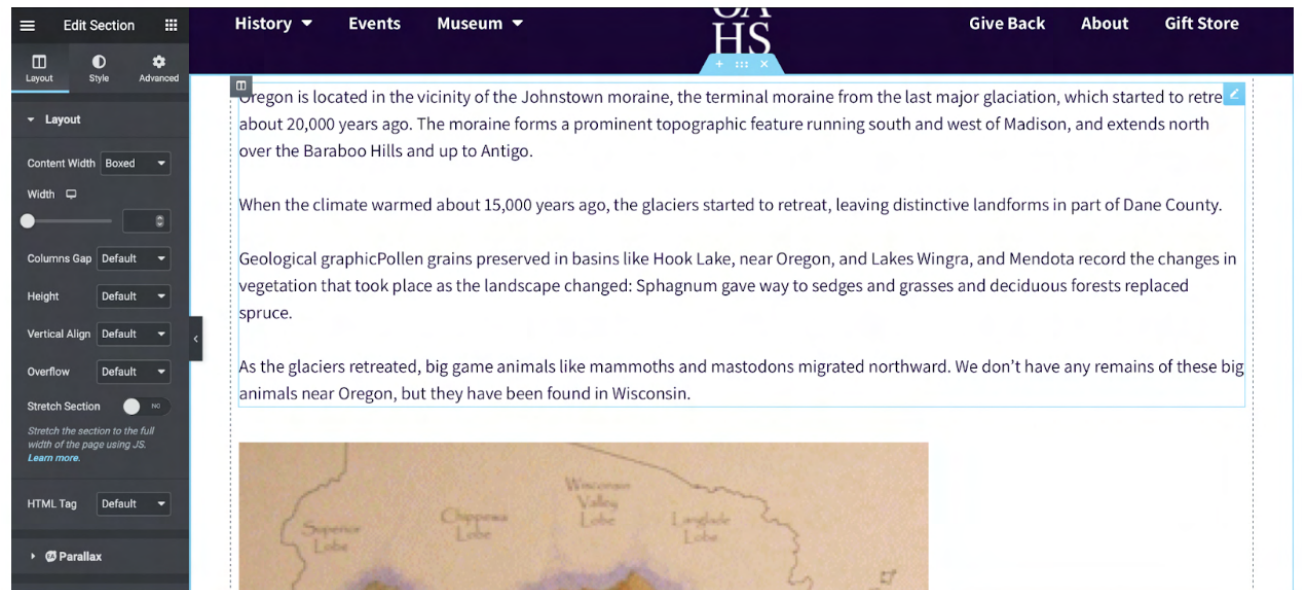
Make sure you're clicked on the Advanced Tabs Section then:
Content > Content > Add Item/ or click X to remove

The screenshot displays the 'Edit Advanced Tabs' interface. On the left, a sidebar shows 'General Settings' and 'Content' sections. The 'Content' section lists the tabs: Geo Hist..., Native A..., Lead Trail, Schools, and Living, each with an icon and a remove button (X). Below the list is an 'ADD ITEM' button and a 'Go Premium for More Features' message. The main area shows a preview of the 'Geo History' tab, which includes the table from the previous blocks and the text paragraphs. On the right, a 'Navigator' panel shows a hierarchical view of the content structure.

Edit a tab: To edit a specific tab, you'll click on that tab's name and it will bring up a menu. You can choose if there's an icon or image by the title, change the title, and choose the content type.

Content Type: You can choose between Content and Saved Templates. Content allows you to just type directly in the tab area, but it only allows you to add text. If you're wanting to add images and make sure it's all consistent I would recommend Saved Templates.

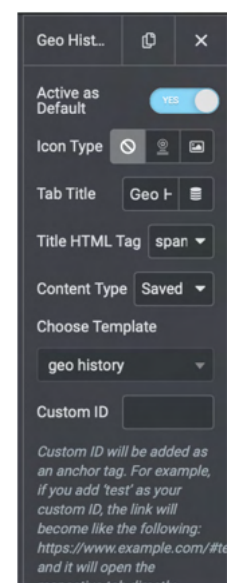
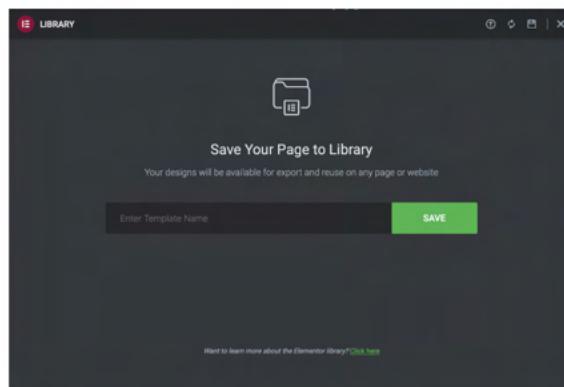
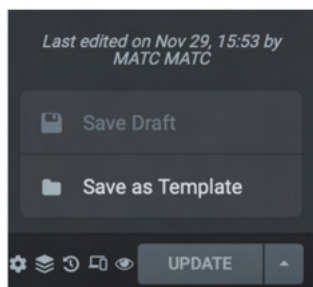
Saved Templates: To use Saved Templates you would first create a brand new page, then insert any text you want and any images too.



Then next to the button that would say Publish for a new page, you'll click on the arrow and save as a template... making sure to name it so you know what it is.

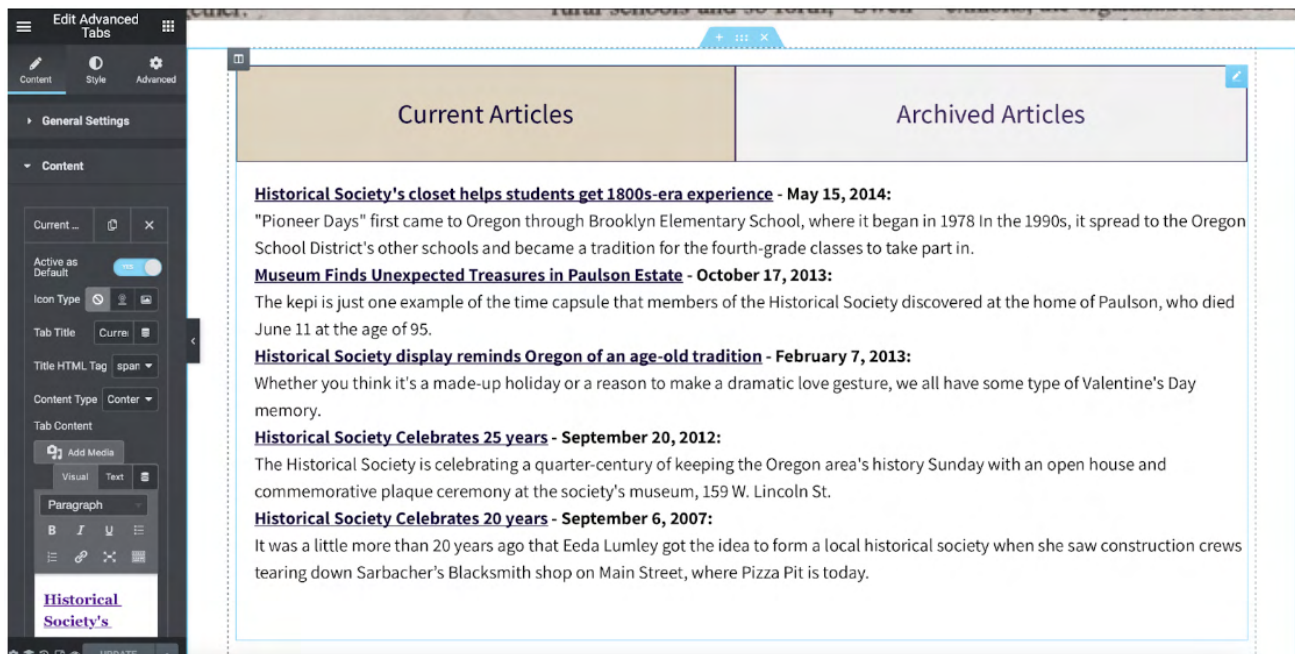
Once you create that new page, click on the arrow next to the Publish button, and select save as Template. Make sure to give it a name you can easily remember and publish the page.

Then go back to the exhibits archive page > Click on the name of the tab you want > Content Type > Saved.Choose template > type in the name you gave it



Museum- Museum in the News:

Museum in the News allows you to keep track of any current or old articles you would like. With the same kind of tab system just like with the Exhibit Archive page. Slight difference is instead of Saved Templates it's set as Content, since all of it is text that will redirect to the pdfs. I have the title for the articles set as the link to the page for the pdfs.

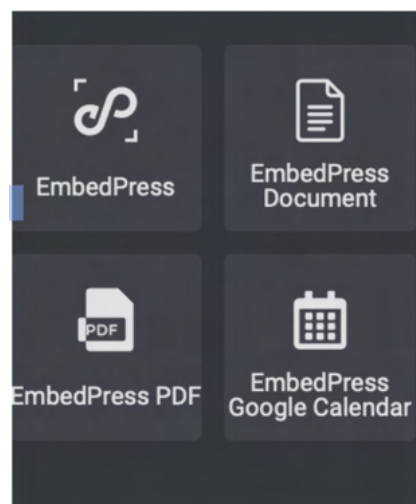


You'll create a new post for the pdf articles to go.

PDF Plug-In: For a pdf plugin, I downloaded the EmbedPress. It allows you to not only upload pdf's by url and upload, but you can also upload Google Docs, Videos, Calendar, etc. I also liked it because it allows the user to zoom in and out of the pdf's, as well as download them onto their computers.

Search EmbedPress, it will show up your options to use within Elementor.

Select and drag EmbedPress PDF



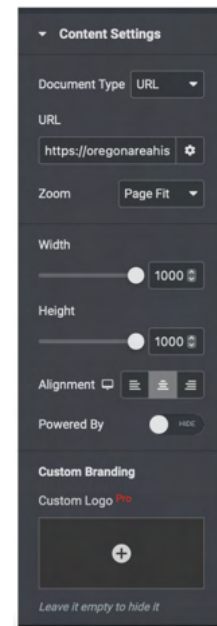
Document Type: Choose between uploading your Pdf file or insert the pdf link

Zoom: Choose how big the page is on screen, Page Fit, will fit the entire page.

Width & Height: Have set to 1000, but you can decide If you want to change or not

Alignment: Centered

Powered By: Turned off/Hide, if you have this turned on It will say Powered by EmbedPress right underneath the PDF's.



Museum in the News Continued: Once you have the new post page done and published:

Highlight the title of the article > insert/edit link > link options > you can paste that posts url or choose/search the existing page from the list

Insert/edit link

Enter the destination URL

URL

https://oregonareahistoricalociety.org/providing-for-pid

Link Text

Historical Society's closet helps students get 1800s-era

☐ Open link in a new tab

Or link to existing content

Search

No search term specified. Showing recent items.

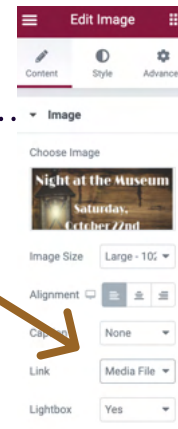
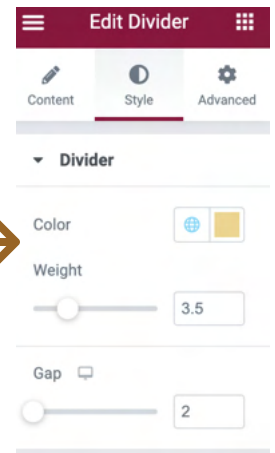
Newsletter Archive	PAGE
404	PAGE
Native American	PAGE
Geo History	PAGE
Exhibit Archive	PAGE
Museum	PAGE
Contact	PAGE
History in the Making	PAGE
Historic Homes	PAGE
This Month in History	PAGE
Military	PAGE
Businesses & Services	PAGE

Cancel

Update

Event Page

- **Adding Spacer/Divider between sections**
 - Elements
 - Divider; 3.5px; global colors
- **Past Events pop up**
 - Link - Media File; Link to different page? New page?
 - Lightbox? Opens overlay on top of current page
 - Hover - Opacity/CSS Filters/Transition/Animations...



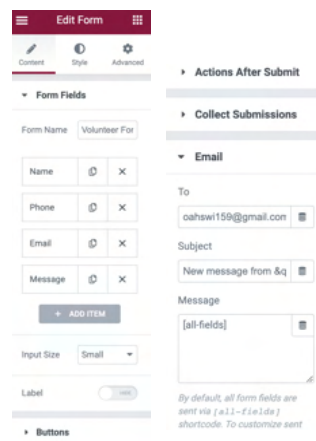
Give Back

- **Building sections from blocks**
 - Plus sign (+)
 - Plus sign (+) again
 - Choose number of columns & layout
 - Choose elements and build out sections/inner sections
 - Sketch out first to see what you need
- **Responsiveness**
 - Build extra sections
 - Advanced Tab
 - Responsive
 - Hide on Desktop/Tablet/Mobile
 - Think of spacing, centering, sizing

SELECT YOUR STRUCTURE

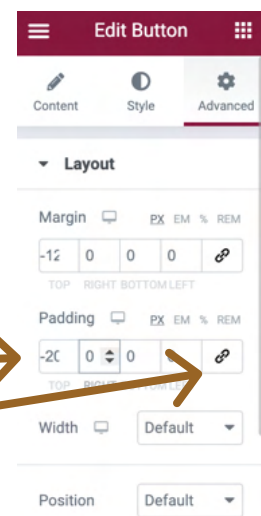


- **Contact Form**
 - Plus Sign
 - Add Element (form)
 - Form fields
 - email



About Us

- **Negative Padding**
 - Select element
 - Unlink the 4 directions
 - Move the element using padding on various sides



Final Thoughts:

We know that this is a lot of information to process and it looks overwhelming, but once you spend a little time in Elementor, this will all make more sense. You likely won't need mess around too much with what we've already created for you, but this will act as an excellent reference if you ever want to dive deeper into your pages and posts.

It has been a true pleasure working with OAHS this semester! We are going to remember this experience for the rest of our lives and we couldn't think of better clients to have. Thank you so much!

Miranda, Mackenna & Mat

