

CERES Exhibit Toolkit: An In-Depth Guide

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Welcome to the CERES Exhibit Toolkit! This WordPress-based software is meant to help you digitally publish exhibits featuring items from the Digital Repository Service (DRS) and the Digital Public Library of America (DPLA). CERES was created by the Digital Scholarship Group (DSG) at Northeastern University's Snell Library with a focus on helping staff, faculty, and students curate, preserve, and publish their work. Here, we at the DSG have provided an in-depth review of what CERES is and what it can do. For a guide on how to design and build in your own CERES website, please view our user guide at CeresToolkit.dsg.northeastern.edu. You can contact the DSG with any questions at DSG@northeastern.edu.

Included in CERES

When project teams are issued their Toolkit site, the installation includes:

- Their predefined project URL
- The template theme already installed
- The CERES plugins already installed
- The collection or set URL
- A template for their project home page
- A template for the credit page
- Pages for Search, Browse, and Collections (contents determined by the collection or set PID)

Project Home Page Template

Every installation of CERES has a homepage template, which includes the following:

-University Lockup: All projects are required to have the appropriate site-wide branding: a hard coded header and footer (approved by Northeastern University Marketing and Communications) and a second footer that gives credit to the CERES Exhibit Toolkit.

-Header: A sample header, populated with the project's name.

-Sample Site Menu: Search, Browse, Collections, Credit, About

Search: This page can be navigated to from the main menu or from the search box. When it is navigated to from the navigation bar instead of from the search box, is populated with a list view of the items in the top-most collection indicated in the collection URL. It includes facet options for filtering results. When searched using the search box, it displays the search results organized by most relevant.

Browse: Provides a similar interface to Search, where browse instead organizes items alphabetically by collection or item title in a tile view with metadata.

Collections: Shows all collection folders available, included nested collections, from the DRS.

Credit: A page where projects list their members, alumni, citation preferences, and licensing and copyright information. This page also gives credit to the DSG and the CERES Exhibit Toolkit

About: Describes the project's research questions, goals, and outcomes.

WordPress Theme

CERES project sites **come pre-installed with a specific theme.**

The CERES Team provides projects with the **Quest** WordPress theme. This theme has a clean interface and a level of design flexibility that will enable projects to create pages in line with their technical and design ideas for curating and publishing DRS content. Quest offers an array of styling options for font, color, and other design elements, which provide users with control and flexibility.

This pre-selected theme enables project managers with little design or coding experience to focus on other curation matters and on the preparation of content for DRS ingestion and eventual publication. If a project team does decide to use an alternate third-party theme, the DSG cannot always guarantee full support for themes over which we have no control. We may sometimes be able to discuss new themes to determine if we should adopt it as an additional supported Toolkit option.

WordPress Plugin Requirements

Every CERES installation comes with a suite of plugins that allow it to function. They are:

- Black Studio TinyMCE Widget: Adds a new "Visual Editor" widget type based on the native WordPress TinyMCE editor.
- CERES Exhibit Toolkit Plugin: This plugin provides the core functionality of the CERES Exhibit Toolkit and brings the content of a project from the DRS into Wordpress using the DRS API.
- iThemes Security: Protects your WordPress site by hiding vital areas of your site, protecting access to important files, preventing brute-force login attempts, detecting attack attempts and more.
- Jetpack by WordPress.com: Jetpack enables you to connect your blog to a WordPress.com account to use the powerful features normally only available to WordPress.com users.
- Page Builder by SiteOrigin: A drag and drop, responsive page builder that simplifies building your website.
- Relevanssi: This plugin replaces WordPress search with a relevance-sorting search.
- Widget Context: Shows or hides widgets depending on the section of the site that is being viewed.

Search functions on CERES Project pages

A visitor to a CERES Project page should be able to easily conduct a basic search using keywords and then refine his/her search on a search results page.

We have included these search functions in the form of a persistent search bar (always located on the upper-right hand corner of the site) as well as a search page that is reachable from the menu.

Default Display of Search Results:

The DSG has configured the search results to display ten items on the results page, arranged in order of "relevance," with items showing up in the order of their ID numbers by default.

Individual item search results display:

- A hyperlinked item title name (full title)

- A thumbnail image
- The first 50-100 characters of an item's "Description" metadata field is visible
- The Creator name is visible. Additional metadata can be made visible by default in the back end.
- An option to click "View More" that brings users to the individual item's page, with full metadata and download options.

Searches can be modified to display:

- Relevance
- Date (earliest to latest)
- Date (latest to earliest)
- Title A-Z
- Title Z-A
- Creator A-Z
- Creator Z-A

Browse

A visitor interested in browsing content can visit the "Browse" page. Browse results differ from Search results in that users can only see thumbnail images and titles of items, and the results are displayed as a mosaic. The "Sort By" options for users are the same as those in the "Search" page.

Collections

A user interested in browsing different collections can use the "Collections" page. This displays the collection thumbnail if available, as well as the collection name. Collections are determined by the collection structure within the DRS. By default, they're sorted by relevance, with 10 on each page. The "Sort By" options for users are the same as those in the "Search" page.

Displayed Facets

Each facet box displays a hyperlinked list of relevant facets, i.e. the "Subject" box would provide a hyperlinked list of all subjects related to the search term. Facet boxes also display the number of items for each subject, year, type, etc. related to the search and attendant facets. The exposed facets are creator, creation year, subject, and item type. Facets will appear on both the "search" and "browse" pages. The "subject" facet will only show authorized subject terms applied to items in the DRS, not un-authorized keywords.

Related Content

The main search display only searches items from the DRS and their metadata. In order to make the whole site searchable, including content written in WordPress pages, we have also included a "related content" bar on the right-hand side of the search page. This is the regular WordPress search, and allows users to get all relevant search results from both the DRS collection and text written on the WordPress site itself.

Building Sites in CERES

CERES Exhibit Toolkit home page

The home page of a CERES Exhibit Toolkit site provides site visitors with an overview of the project, a selection of featured content (like exhibits), a collection of links to important sections of the website, and the ability to search items in your collection or set.

The home page should help visitors easily find contextual information about the project, know where content lives in the project website , and know where and how to search for additional content in the project website .

General Layout of Home Page

Project Title / Logo: Projects have the option to display their project title (or a customized logo / image featuring the project's title) at the top of the home page.

Search Box: The Search box for the project appears underneath the project's title / logo on the right-hand side of the screen. Users can search for terms in the box by hitting "Enter" after inputting the desired terms.

Project Introductory Text: This is a brief description of the project that provides an overview of the collection.

Gallery Slider: By default the front page has a gallery slider that allows projects to display DRS items. It can be created and edited via shortcodes, the same way as all other CERES Exhibit Toolkit gallery sliders.

Text and Links: Projects can use the pre-formatted page to display three sections of text with links under them. This is a good way for projects to feature certain content or exhibits. Projects can also feel free to modify these sections however they would like, or to use a different format entirely.

Widgets: Sidebar widgets are available via the theme for groups that would like to use the blog or advertise events.

Northeastern/DSG Branding

Northeastern branding and design should be in line with established conventions by the University's Office of Marketing and Communications. A default header and footer are included, and projects must consult the University Marketing and Communications office before using

other branding. Each site includes a hyperlinked footer that reads, “This project was created using the CERES Exhibit Toolkit with help from the Digital Scholarship Group at the Northeastern University Library.”

Building Exhibits

Content becomes available in CERES after the project inserts their collection or set URL in the backend of WordPress. Then, you can click the "Insert Toolkit Shortcodes" button when you build a page or post. You can then choose items in the collection to embed with several display options: these include a gallery slider, a pinterest style gallery, a single item display, and a media playlist. Projects can also display items on maps and timelines.

CERES has now implemented “sets” that allow projects to customize a project-specific collection of items from across the entire DRS . Sets are created in the DRS, and the URL functions in CERES Exhibit Toolkit the same way a collections URL does.

Media Library

You should use the Media Library only for project content that is not secured in the DRS or the DPLA, since Media Library material is not secured and catalogued and therefore its preservation cannot be guaranteed by the DSG. Projects should still add this content to their sites using Toolkit Shortcodes, rather than directly through the Media Library.

CERES Exhibit Toolkit Features

Shortcodes

Shortcodes utilize WordPress’s internal syntax to generate code that calls specific items from the DRS using a unique identifier and then displays them in a particular format on the page/post. For example, the below shortcode pulls the item attached to the DRS ID “neu:212654”, displays it as a single item, and describes settings pertaining to size, media, captions, and zoom functionality.

```
[drstk_single id="neu:212654" image-size="4" display-video="true" display-issuu="true" align="center" caption-align="left" caption-position="below" zoom="on" zoom-position="1"]
```

Users do not have to come up with this code themselves; our developers have created a point-and-click graphical user interface (GUI) to do so. To create a shortcode, the user must click on “Add Toolkit Shortcodes” on the visual editor page. This will lead to a pop-up window that presents options for embedding objects from the DRS and/or DPLA. Users have the option of single item, tile gallery, gallery slider, media playlist, map, or timeline. After users decide how to structure their content, they are prompted to select or search for specific items from the DRS

and the DPLA, and edit the settings that describe the manner in which the item will display on the published page/post.

Shortcodes can be edited through the GUI by double-clicking on them in the visual editor.

Maps

Maps functionality was developed to cartographically represent items with latitude and longitude coordinates in their DRS metadata. It uses the shortcode functionality to call items from the DRS or the DPLA, categorize them, and then plot a marker with a thumbnail, metadata, and a link to the item's page. This creates an interactive map with a choice of three base layers. Users can also create color-coded legends in order to further categorize the items they plot. This feature was initially developed by a CCIS graduate class in Spring 2016 and further refined and implemented by DSG staff shortly thereafter.

Timelines

Timelines can be created from a combination of repository items that have associated date and time metadata. Timelines use shortcode functionality to call these items from the DRS or DPLA and plot flags to represent them. Users can view a thumbnail, metadata, and a link to the single item page for each individual item. Users can also create color-coded legends in order to further categorize the items they plot. This feature was developed by a CCIS graduate class in Spring 2016 and further refined and implemented by DSG staff shortly thereafter.

DPLA Connector

A user interested in showcasing items from the Digital Public Library of America's repository can incorporate these items alongside both DRS and local (Media Gallery) items. Items hosted by the DPLA can be searched from a tab within the GUI used for adding shortcodes and then selected by clicking the "Add Toolkit Shortcodes" button in the WordPress page editing interface. Items chosen are then incorporated in a "Selected Items" tab, along with other items selected from the DRS and local item tabs, and can be inserted into the page in the same shortcode. As with DRS and local items, these items can be embedded in the same ways as DRS items, and the way that the items display when embedded can be changed in the "Settings" tab of the Shortcode GUI. This feature was developed upon request from the Early Black Boston Digital Almanac Project and Northeastern University Archives and Special Collections.

Single Item Pages

All items have individual pages within the WordPress site. If a user clicks on an item on the WordPress site, it will bring them to that item's page. This page displays the largest thumbnail, not the master file. It also displays all of the item's metadata, and gives various download options depending on the file type. Media items can play in this page as well. Single item pages

allow users to utilize the zoom feature, where they can get a closer look at high-quality images of the item they are viewing. A box with each of the pages an item is used on is displayed on each single item page that allows a user to navigate back to exhibits with the items they are exploring.

Users can rearrange the display of metadata system-wide. In the CERES Exhibit Toolkit settings, users can select a subsection of metadata to display, as well as re-arrange that metadata to display in a different order. For example, users can choose to display only an item's title and date, rather than display all of the cataloging available for that item. This selection will be applied across all single item pages; it is currently not possible to customize metadata order just for a single item page. If users want to retain and re-order all metadata, they must select all boxes. Users can customize the display names for metadata by typing the name they'd like to display in the text field next to the metadata field they want re-named. Users can also choose to add in a custom metadata field by clicking "add-metadata field" and typing the name of the field they'd like to add. This allows them to select the custom metadata if they're only displaying a sub-set of their full metadata. User must select the metadata they want to display in order to use custom labels.

Items can have static text associated with their single pages. You can enable this setting by selecting "Enable Item Page Custom Text" under the CERES Exhibit Toolkit settings. Then, by selecting "item pages custom text" from the sidebar on the left of the admin dashboard and putting an item's DRS identifier into the text box in the upper right-hand corner, users can write a custom block of static text that will display below the item's metadata, thumbnail, and download options. This customization does not apply across all items, but rather is only applied to a single items page.