Learning from Libraries that Use WordPress

Content-Management System
Best Practices and Case Studies

Kyle M. L. Jones / Polly-Alida Farrington

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Preface

Our Goals

As authors of a technical guide we are de facto "tech evangelists." This is an awkward position, for we must constantly fight this interplay in our research, writing, and editing of promoting a tool and, at the same time, acting as its most stout critics. It is one thing to write flippantly and quickly about "the next greatest thing" in library technology; it is quite another to be charged with composing a report that is expected to be read as an unbiased guide.

With this in mind, we have approached this book with a determinedly careful pen, recognizing that our goal within these pages is not to rave about WordPress—you can get plenty of this on WordPress fan sites—but to provide the following for library practitioners:

- A critical overview of WordPress as a web-publishing tool, especially as defined in a content-management system (CMS) context
- An evaluative measure not only of the system's advantageous features but also of any failings that may cause concern or road blocks
- A miscellany of best-of-breed techniques, plugins, and external resources

Content Management Is No Longer Optional

But why even write about another library-related technological tool, especially a CMS? We believe that, now more than ever, content management and strategy as they relate to web publishing have an increased importance in the workflow and identity management of libraries—so much so that they cannot be considered optional. Engaging with library users on the web is no longer restricted to simply putting a static HTML file on a server and calling it a successful website. Yet without technical assistance and forethought, content management can be an actively complex and frustrating process.

Even defining what exactly a CMS is can be daunting. First, how do we define content? Certainly pages and bloglike posts are content, but so are link lists, calendar events, social site updates, image and video galleries, comments, and much more. Each type of content has its own form of authorship and maintenance. And as more content features and types are added into the publishing environment, the CMS becomes even more complex. We define a CMS as follows.

Structurally, a CMS is a type of software application that allows for the online publishing and management of content where content is defined by the author. That content is flexible, extensible, and may exist or be created in a variety of sources but can be somehow interacted with by the CMS.

Organizationally, a CMS promotes content creation by multiple authors via user roles, system permissions, and appropriate and usable publishing interfaces. The opportunity for authors to have varying capabilities as well as work within a usable publishing environment is a sign of a CMS that empowers content creation.

In summary, a CMS is an application that lets you manage your website more efficiently by separating the tasks of designing and managing the website from the job of adding content. Administrative users can configure, customize, and add features to the site; editors/contributors can add, edit, and manage their own contributions without worrying about the more technical aspects of the site.

Library website content must be viewed in much the same way as a physical library's collection:

- Who can access the collection (staff and visitor user roles for the website)?
- What content should be added to the collection (content strategy for publication)?
- Where is the collection accessible (desktop and mobile access to the website)?
- When is the collection accessible (editorial schedule)?
- Why is the collection organized as it is (applying appropriate information architecture and taxonomical systems to content)?
- How is the collection interacted with (social features of the website)?

A library website, to apply S. R. Ranganthan's Fifth Law, is a growing organism and must be treated as such, especially with the complexity of web content. CMSs have been built to handle many, but not all, of the aforementioned needs. Some handle these needs in similar fashions; others take different approaches in technique and complexity.

Creating a Positive (Staff) User Experience

Increasingly, libraries are interested in having multiple authors maintain their website, rather than a single point person. This motivated us to focus our writing and research on how a CMS handles the user experience not only of the website visitor but also, and just as important, of the content creators—that is, the library staff. In her 2010 book *Content Strategy for the Web*, Kristina Halvorson puts it perfectly: "You can buy the Cadillac of all CMSes, with every known feature under the sun, and the implementation can still fail. Why? Because the tool is not the thing. The content and the people who manage it are."

Adding a variety of authors to a library website lends a broader and more human voice to the web presence. Staffers from technical services to administration all experience a unique point of view in the library, not to mention having solidly distinct skill sets. Adding their voices to the collective authorship of the content helps to create a dynamic and engaging website. Doing so, however, increases CMS administration in terms of security practices,

user roles, and the online editorial process—all points that must not be overlooked when choosing a CMS.

Once the CMS administration of multiple authors is handled effectively, getting buy-in by staffers to participate in the authoring process is another hurdle to overcome. Although some of this conversation exists in job descriptions and duties outside the scope of this book, the greater point to consider is the content creation experience for the staffers. If it is overly complex or graphically difficult to navigate, staffers will not participate. The importance of massaging the CMS to be friendly to the content creators cannot be overstated.

Starting Your CMS Journey

Choosing a CMS is a process. Extensive testing of CMS candidates is just as vital as vetting them with resources. And do not forget the broad network that is the field of librarianship and the web. Someone, somewhere, either in librarianship or outside of it, has used your particular CMS and most likely has the same questions you have.

No matter which CMS you choose, WordPress should be a strong candidate as you narrow down the field of options. Its extensibility, vibrant community of users, and successful features set it apart from many of its competitors.

Multiple Identities

For Blogs, CMSs, and So Much More

WordPress started in 2003 with a single bit of code to enhance the typography of everyday writing and with fewer users than you can count on your fingers and toes. Since then it has grown to be the largest self-hosted blogging tool in the world, used on millions of sites and seen by tens of millions of people every day.

—"About WordPress," WordPress.org

A BRIEF YET INFORMATIVE HISTORY OF WORDPRESS

In 2010, WordPress was powering around 56 percent of all the websites built on CMSs.[1] That's an impressive statistic that speaks not only of WordPress's increasing adoption rate by users but also of its permanence. Millions of individuals across countries and spanning a plethora of disciplines and website purposes have chosen WordPress over such systems as Drupal, Joomla, and ExpressionEngine to house their data, display content, and interact with their site visitors.

But to really grasp how WordPress has risen in the ranks, we need to look a bit into the past to understand where the software has come from and how it might develop in the future. Like most pieces of software, especially those that have gone the open source route, WordPress has a rich history of development.

The Fork, Open Source, Matt, and Automattic

WordPress was not always WordPress. In 2001, b2/cafelog was created by some aspiring individuals who saw a need to develop a web publishing system. Their final project was a piece of blogging software that saw a minimal adoption rate. In 2003, Matt Mullenweg and Mike Little forked the original b2/cafelog code and began what is now known as WordPress. Both b2/cafelog and WordPress were built on the same technical foundations of using open source software tools—MySQL for the database and PHP, a server-side scripting language—to create dynamic pages built on information stored in the database.[2]

For the past nine years of WordPress's existence, and without much of a doubt for its future, it has continued in the open source tradition by unveiling all of the source code

it is built on and encouraging community input in its development. From the Codex that holds its technical information to the flurry of activity in the support forums, community involvement is what drives the innovations within WordPress. This would not have been accomplished as successfully without the emphasis on open source.

Who owns WordPress? If a project is truly open source, the community takes responsibility. But a rift of sorts has the community slightly divided. Mullenweg continues as a lead developer of WordPress while maintaining his founder and developer role at Automattic, a venture with over $30 million in funding that runs the highly popular WordPress.com blog host, among other popular applications.[3] The struggle exists in Mullenweg's dual role at WordPress and Automattic, where his influence in the open source organization could be used for his financial gain. Moreover, Automattic employs nine developers (not including Mullenweg) of the WordPress platform, which begs this question: Do they write code that's in the best interest of the community or for Mullenweg's commercial venture Automattic?[4] Though it is easy to raise red flags about this situation, many WordPress supporters believe that Automattic's interest in—if not influence of—WordPress can only add to the stability and improvement of a software package that Automattic relies on for commercial success.

Evolution: Blogs, Specialty Sites, and a Full-Fledged CMS

At the root of WordPress's existence is a firm, consistent focus on the blogging experience. It is the true identity of WordPress and, without hesitation, it must be said that blogging is what WordPress does best before anything else. In fact, WordPress does blogging *so well* that, even when its other features shine and plugins transform it for other purposes, we have heard folks grumble and retort, "It's just a blog." To understand WordPress as a CMS, it is necessary to first identify what makes WordPress such a great blogging system.

Like any good blogging software, WordPress is post-centric, meaning the primary content being published is in post form. Posts are pieces of content—text, media, or a combination of both—that are published in a dynamic manner. They could be written and published for up-to-the minute news, as is the case for Gizmodo's technology liveblog, or in a more traditional daily context, like CNN's Political Ticker. Posts can be scheduled to publish on a certain day and time; they can be set into draft modes for future editing and revision; different draft versions written over time can be compared; and they can be organized in traditional, strictly defined categories or by free-form tagging taxonomy or both. All of this is done in one of the simplest-to-use and most highly regarded user interfaces among competing CMSs.

The team at WordPress wants to make your blogging experience simple and sweet:

> We're never done with simplicity. We want to make WordPress easier to use with every single release. . . . In past releases we've taken major steps to improve ease of use and ultimately make things simpler to understand. . . . We love to challenge ourselves and simplify tasks in ways that are positive for the overall WordPress user experience. Every version of WordPress should be easier and more enjoyable to use than the last.[5]

This dedication to and continual improvement of the user interface and user experience is at the core of why WordPress is one of the most beloved blogging systems—and why it acts as a wonderful framework for unique uses of the software.

What never fails in the WordPress community is someone saying, "I think I can do *x* with WordPress," where *x* is a completely nontraditional approach to what is said to be *just* blog-

ging software. Two excellent examples of such alternative sites just happen to be WordPress community resource sites. One, themefinder (http://themefinder.wpcandy.com), is an aesthetic wonder for visually browsing for WordPress themes by screenshots filtered by color, cost, and layout. In what is still a text-heavy web, themefinder unleashes the potential of creating an entirely visual content experience with faceted searching leading the user to exactly what she wants. In a much different vein, WP Questions (http://wpquestions.com) taps into the WordPress hive mind with a question-and-answer site. The premise: ask a question with a monetary award; pay those who answer your questions most thoroughly and effectively. If more than one individual adds to the overall answer, you can split the reward across responders. All financial transactions are handled quickly and efficiently through PayPal.

It is simple to see that these are dramatically disparate representations of what WordPress can do beyond blogging. They take distinct approaches to defining their content, not to mention to engaging their users in the consumption and creation of the content.

It is ironic when individuals state that WordPress cannot be used as a CMS and then it goes on to win Packt Publishing's 2009 Open Source CMS Award and its 2010 Hall of Fame CMS Award.[6] The "it's just a blog" mentality has permeated most individuals who are on the path to acquiring a new CMS for a project, and the educative process to rectify this idea does take some illustrative effort.

The definition of a CMS, as in our introduction, is truly dependent on the project in which the CMS is used. Generally, though, a site that has some kind of structured content and uses some web-based software to handle that content—as opposed to doing HTML markup by hand—is being powered by a CMS. Two fine academic examples of the use of WordPress as CMS come to mind: those at Bates College (www.bates.edu) and the Tufts Roundtable Commons (www.trcommons.org). Both of these sites have static pages, dynamic blogs, organized media, and a variety of content types to tell stories and provide information about their institutions. Although a cursory glance at the sites doesn't reveal the complexity behind the scenes powered by WordPress, it does suggest that WordPress can and does handle much more than blogs.

Are all of these examples replicable by libraries? Well, that depends. With most visually appealing and pleasing web experiences, a skilled team of developers, information architects, and designers are behind the scenes innovating with the latest programming technologies and implementing industry standards that are proven to create excellent user experiences. It would be foolish to say, "And you can do this, too!" without properly framing such a statement. Some of the aforementioned examples are one-off projects that took great planning and skill to produce and would not be replicable without the same amount of skill by another individual or team. Others, specifically the CMS examples, include elements of content structure and even design which, with effort and time, can be replicated. In fact, the majority of the rest of this book is primarily dedicated to providing the toolbox and resources needed for doing just that.

The Future of WordPress

It is uncertain how WordPress will evolve from here. But if the current trend of innovation in WordPress continues, what we will see could be defined more as a platform for web-based content and user engagement. How does this differ from the current state of WordPress or from CMSs in general? Even with the push for user-generated content, websites—especially library websites—are still very much dependent on their original authors, or owners, for content. As a bona fide platform, WordPress will streamline the process for users as content creators while making the job pleasant.

Beginning with version 1.5, WordPress includes the ability to have any number of users on a site with defined user roles and capabilities.[7] Although this feature has been taken advantage of by select sites, it is still very much a niche case feature. An exceptional example of putting user-created content first and foremost is visible in the P2 Theme (http://p2theme.com). Branded as "Twitter in a box," P2 makes commenting, user status updates, and blogging simple by uncluttering the writing user interface via a front-end editor instead of using an administrative back end. BuddyPress (http://buddypress.org), a comprehensive social networking plugin that adds extensive features to WordPress (see chapter 9), builds on P2 by adding completely customizable user profiles, user groups, forums, and many more social elements. What will be seen in the future of WordPress is a more explicit push—and a streamlined workflow—for user-created content on WordPress sites. And though the current state of WordPress by way of plugins allows for aggregation of content from non-WordPress sites (Twitter, Facebook, et al.) and export of WordPress content such as posts and links, the process can be clunky at times. As more users of WordPress look for flexibility and interoperability of their content from site to site, it can easily be imagined that the contributors to WordPress will hear the call for these features and build them in as native components.

FLAVORS OF WORDPRESS

WordPress.com vs. WordPress.org

When we teach WordPress classes, the most frequently asked question—and a source of great confusion—is about the difference between WordPress.org and WordPress.com.

For many people WordPress.com is their first, and only, experience with WordPress. At WordPress.com you can sign up for a totally free WordPress site. WordPress.com runs the software for you, takes care of upgrades, and maintains the servers. All you have to do is sign up and start adding content. This is one of the services run by Automattic, the company closely allied with the development of WordPress. The free service doesn't allow the complete flexibility had by running the software on your own server, but it's a great place to start experimenting and get a feel for how WordPress works.

The WordPress.org website is home to the WordPress software itself. If you are going to install WordPress on your own web server, download the latest version of WordPress here. WordPress.org is also home to the documentation, WordPress add-ons (themes and plugins), and, most important, the WordPress community, which provides support and a place to share ideas on development of WordPress.

WordPress Single Site vs. WP MultiSite

Prior to the release of WordPress version 3.0 in June 2010, WordPress was available in two "flavors"—single site and multiuser (MU). With the 3.0 release these are now both part of one installation, with the multiuser option now being called MultiSite.

The single-site option is a great choice for running a library or personal website when all the content will be available under a single domain name such as www.mylibrary.org.

The MultiSite option greatly simplifies site administration when a group of separate websites are needed. This is handy for library systems with multiple branches each needing a site with its own subdomain address (e.g., www.eastbranch.mylibrary.org); for special projects that are distinct from the main website (e.g., a special summer reading website or

gaming tournament site); or where staff members each want to have their own individual websites.

WE'RE HERE TO HELP: THE COMMUNITY

WordPress comes with a rich community of people and resources you can turn to when you need help. From the forums where beginners ask questions and experts share their advice, to the plugin and theme developers who give of their time and talent and actually listen to the folks who use their tools, to the tutorials, the book authors, the videos, the tweets, the bloggers—there are multitudes of people and resources to help with questions and many opportunities to give back by sharing your expertise.

For a quick jumping-off point, we suggest looking at the Resources section of this publication, which lists a variety of resources including WordPress Codex (the official WordPress documentation site) pages, bloggers, podcasts, and more.

Join the Community

Even if you're just thinking about using WordPress, take the time to join one or more of the support forums, start reading some blogs, or connect with other WordPress users on Twitter, Facebook, and LinkedIn. Lurk for a while and get an idea of how the groups and forums work and which ones you want to be more involved with.

Do Your Homework

No matter how friendly and helpful folks are, no one wants to answer the same question repeatedly. So do your homework before you post a question on a forum or contact a developer:

- Do a web search for the answer to your question. Someone may have already written a blog post about it. If you find an answer, thank them for the help.
- Search the WordPress Codex.
- Search the forums. Again, add a note of thanks if you find the answer.
- If it's a question about a plugin or a theme, check the WordPress.org plugin and theme directories. There are forum pages where plugins and themes are discussed. Also check the developer's website. There may be a forum there as well.
- Read the manuals. The Codex and the variety of WordPress books available are excellent for a range of answers to the questions you may have.

At a Loss?

Post a question on an appropriate forum, but make sure you read the posting rules first; this increases the chances of getting a helpful answer to your question. Explain the problem clearly and thoroughly. Include details such as version numbers, what hosting site you use, and a link back to your site if that will help someone assess the problem. Check back often to see if there are answers, and follow up with any questions asked. If the problem is resolved, post about it so others can learn too. As you gain expertise, watch for opportunities to help someone else.

Fee-Based Support

There are also theme and plugin services that charge for access to their products and support forums. The models vary, some charging a flat fee for a theme or plugin, some charging a monthly fee for support. Paying a little extra to get reliable support when you need it may be a wise investment for many organizations.

A NICE FIT FOR LIBRARIES

Advantages for Libraries and What WordPress Can Do for Them

In our work training library staff to use WordPress websites and in building WordPress websites, we've seen what a perfect fit WordPress is for many types of library and education organizations—large and small. Here are some of the selling points for libraries:

It's free. This certainly is an appealing feature, but it wouldn't be a selling point if WordPress wasn't also such a flexible, full-featured tool for building a dynamic, easy-to-navigate website.

Easy to get started. Once the software is installed on a server, you can build a simple website in just a few hours. The learning curve for WordPress is not daunting.

Web-based administration. Sites can be administered from any computer that has an Internet connection and a browser. You are no longer tied to that one computer that has Dreamweaver (or an outdated version of FrontPage) on it. Now, when a blizzard closes the library, you can log in from home and have up-to-date information on the site.

Share the workload. It is easy to let other people contribute and update content. Set up user accounts for anyone who will be updating the site. There are several different user statuses that help you control who can publish information and who has access to the more powerful administrative features.

Fresh content. Adding a frequently updated news page is simple. News updates (posts) are automatically displayed on either the main page of the site or another page you specify. This keeps your library's online presence fresh and current, with new and interesting content to keep your users coming back for more.

Commenting features. These encourage increased communication with your library's users while providing lots of options for thwarting spam comments.

Flexible and extensible. There are plugins galore that extend the functionality of WordPress. If you find yourself saying, "I wonder if WordPress can do *xyz*," there is likely to be a plugin available that can help. If not, someone with some programming skills can probably create the custom plugin you need.

Remote updating. With apps for various smartphones (Android, iPhone, Blackberry) and devices like the iPad and Android tablets, updating on the go is easy. This is also a great way to stay in touch with any comments being posted on the site and replying quickly.

Some Growing Pains

WordPress continues to grow and improve its strengths while porting in feature requests from the wide community of users. One of the largest and most ambitious of these requests in recent time has been the integration of custom post types (CPTs) in the 3.0 version released in June 2010.[8] Like Drupal's well-developed content construction kit (known widely as CCK), CPTs allow for the creation of content types, like library database and resource lists, through the use of preformatted fields or input areas for content information.

As a new feature, and a feature that will surely grow WordPress's eminence among CMS choices, CPTs are still being fleshed out. CCK's initial release in 2006 most likely went under the same kind of growing pains CPTs are experiencing.[9] Though the ability to create CPTs is built into the underlying code—meaning they are an inherent part of WordPress—they require either a programmer to write PHP to create an actual CPT or a plugin (see chapter 5 for plugin options). Several plugins do exist to do such a job, but the plugin authors are still building in features to fulfill the true potential of CPTs. You can expect CPTs to become a major feature of WordPress in the near future, but understand that their current state is still elementary.

NOTES

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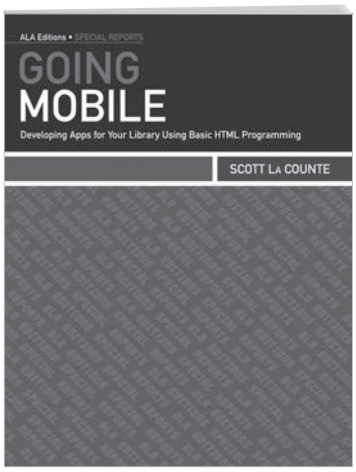

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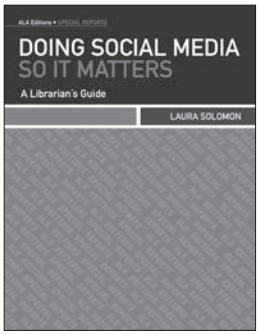

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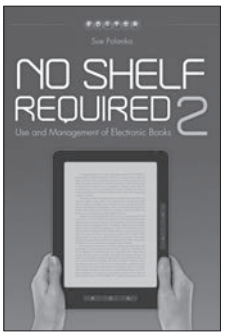

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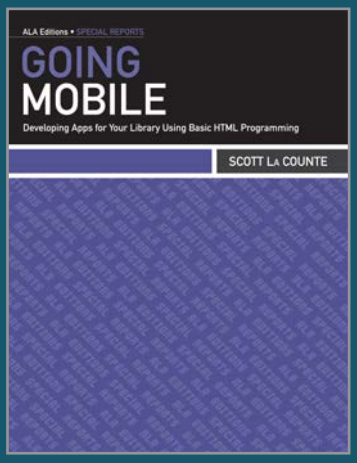

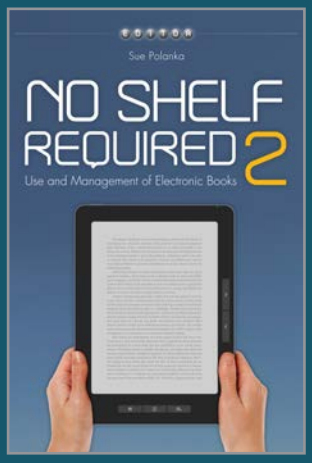

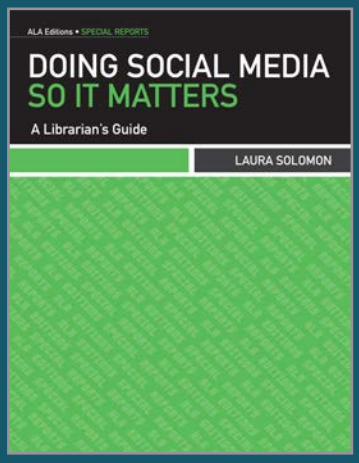

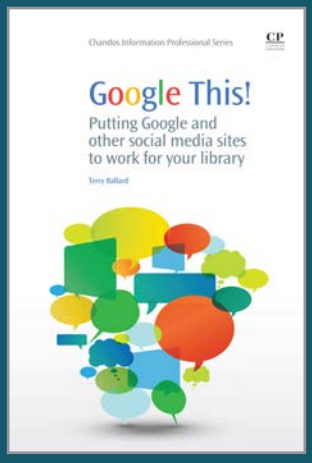

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