

Directions for Creating Harvard Economics-Themed OpenScholar Sites for Graduate Students

The purpose of this document is to assist Economics Department graduate students in creating a “standard” Econ OpenScholar site. Here is an example of how the standard Econ site should look:

<http://scholar.harvard.edu/cage>

Note: If at any point, you need help with OpenScholar sites, please feel free to contact user support: ithelp@harvard.edu You may receive a quicker response if you put “Open Scholar” in the subject line of your request. Should you need additional help, please don’t hesitate to contact Paul Millett, who is the IT Projects Manager for the department.

1) OpenScholar Site Creation

Browse to <http://scholar.harvard.edu/site/register>, log in with your HarvardKey, and fill out the form, and click the “**Create your site**” button.

The screenshot shows a web form titled "Create your web site". It contains several sections: "Your URL" with a text input field and instructions; "Type of site" with a dropdown menu set to "Personal Site"; "Initial setup" with a dropdown menu set to "Minimal"; and "Site visibility" with four radio button options: "Public on the web", "Anyone with the link", "Invite only during site creation", and "Harvard Community". Each option has a brief description. At the bottom of the form is a blue button labeled "Create your site".

Note: If you choose to make your site private while you are creating it, remember to make it public again when the site is ready.

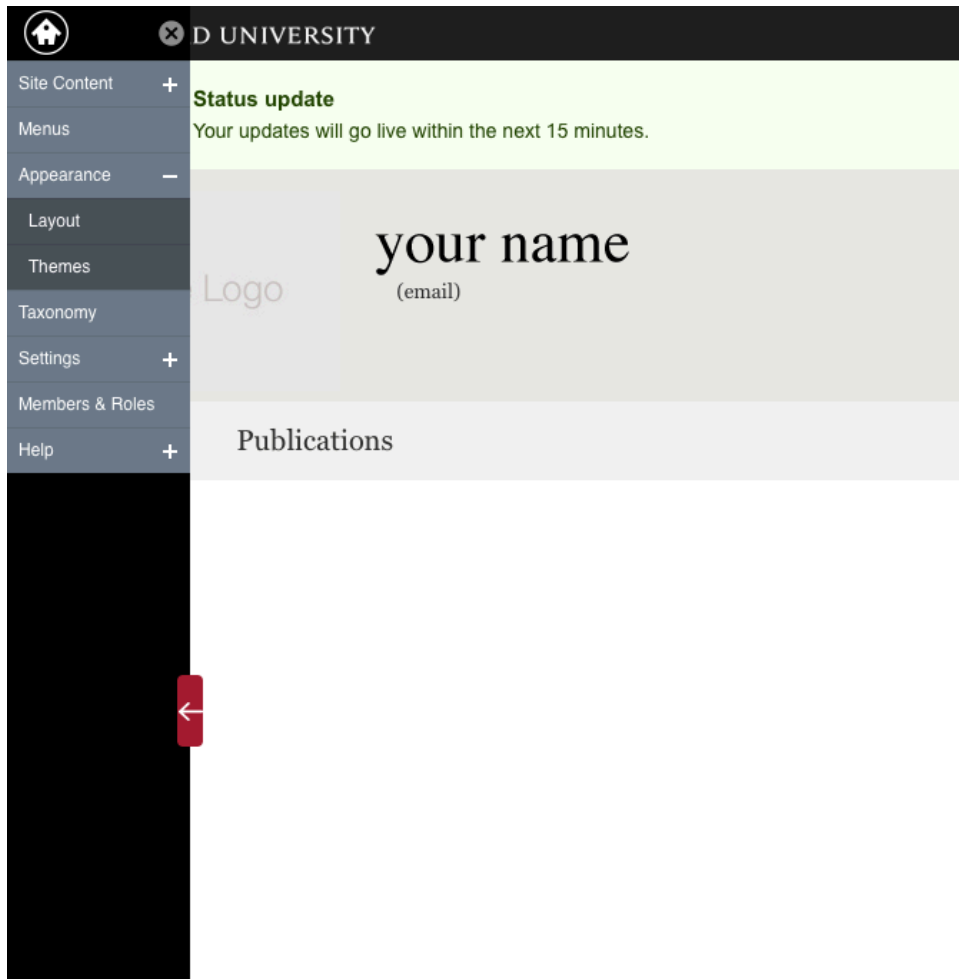
Once you see the “**Success! Your new site has been created**” message at the bottom of the screen, you may log in to your new site by clicking the “**Go there now**” button.

After logging in, the first thing you will see is a notice about Open Scholar documentation and Other Resources (including a link which will take you to information about frequent [Open Scholar training](#) sessions on campus.).

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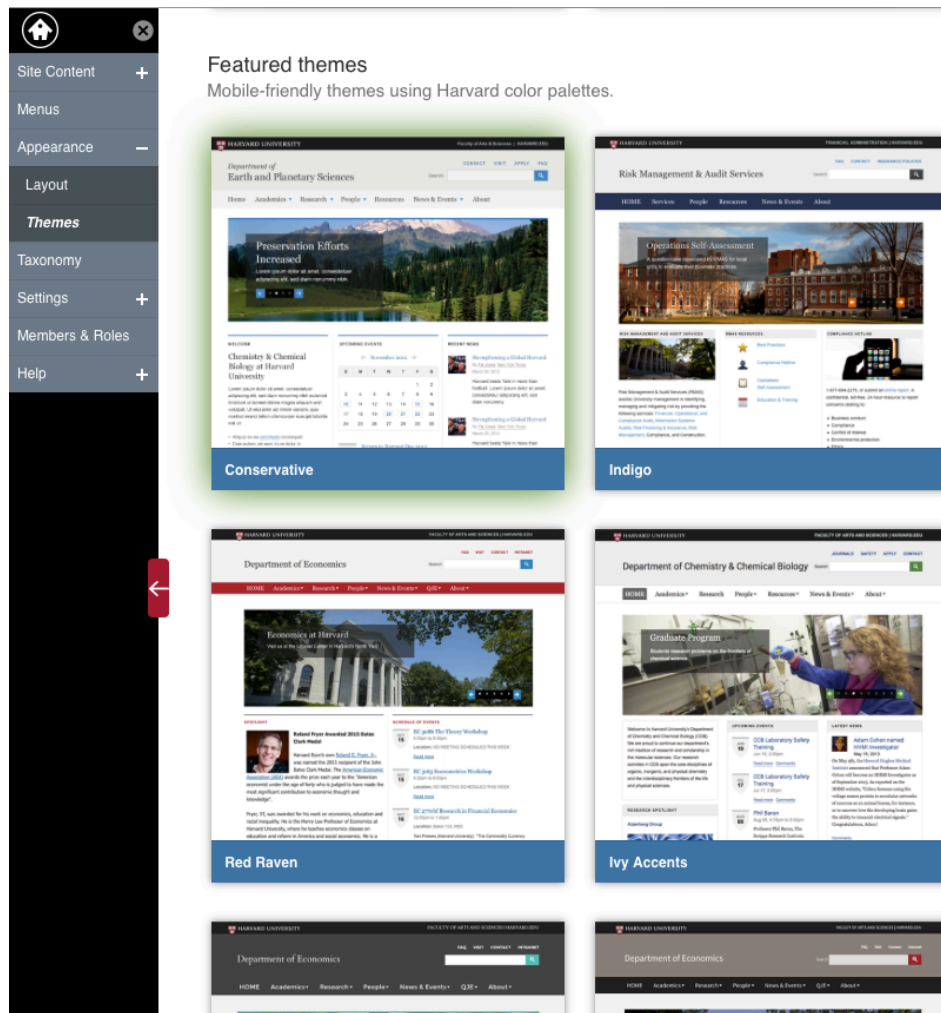
2) Selecting “Conservative” site theme used by Econ.

Close the documentation notice, and on the left side of the screen you will see the black administration console with a small red-enclosed arrow pointing toward it (The admin console is extended or collapsed by clicking on the arrow symbol.).



One of the selections in the list of menu items on the console is “**Appearance**.” Click on it, and additional menu items, “**Layout**” and “**Themes**,” will appear.

Click on “**Themes**,” and the “Themes” window will open, displaying a variety of current templates (or themes) which can be used as the basic structure for Open Scholar websites. Each theme is labeled in the lower left corner with its theme name.



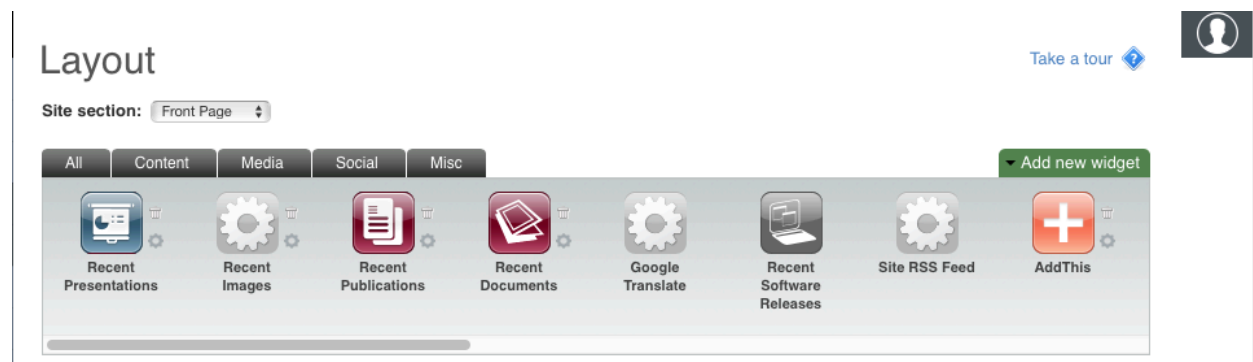
Scroll down the page until you reach the “**Featured themes**,” then locate the “**Conservative**” theme. Click on the theme to select it (it becomes edged in green when this is done.). Next, scroll to the very bottom of the page, and click on the “**Save for (your name)**” button you find there.

Scroll back up to the very top of the page and click on the small house symbol you see in the upper left corner of the black admin console. The themes page will disappear, to be replaced by your now re-formatted site homepage.

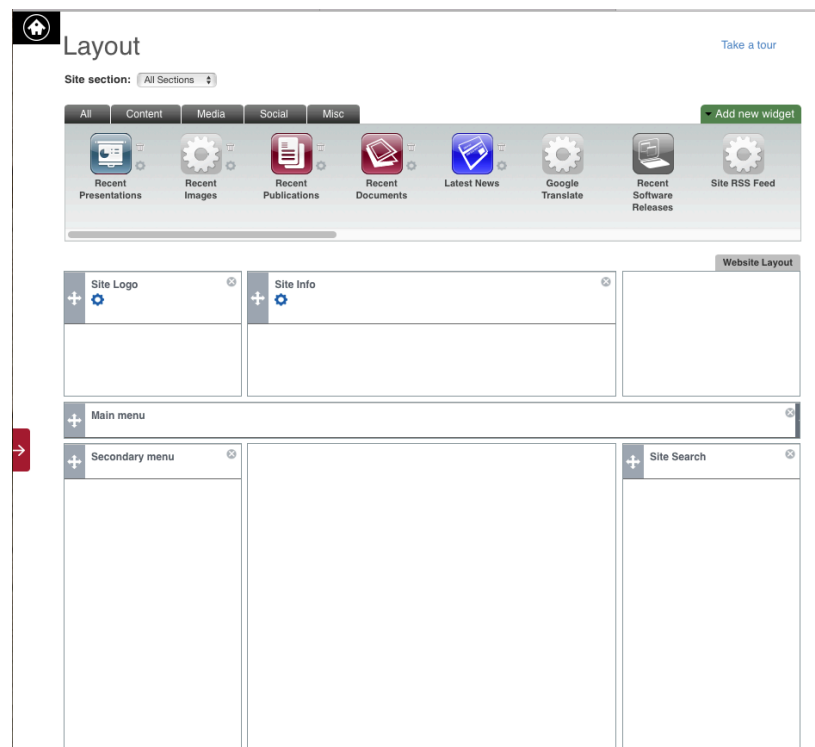
3) Applying Standard Econ Settings

Now go back to the black admin, and choose “**Appearance**,” and then “**Layout**.” The Layout window for your site will open. In the upper right corner of the page is a link titled “**Take a tour**.” Clicking on this link will open a series of call-out boxes which explain the elements of the layout page.

Near the top of the page is the tabbed “**Unused widgets**” gallery, featuring icons representing small modifiable applications called “**widgets**.”



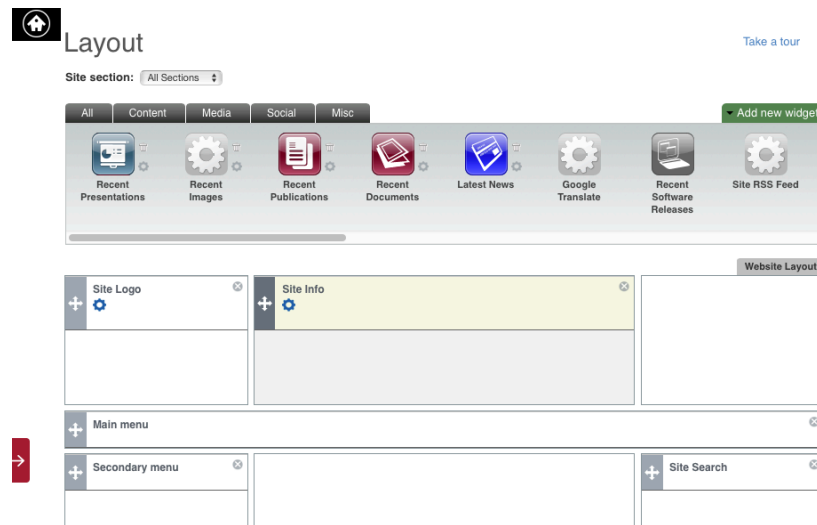
Below the widget gallery is a large schematic representation of various areas on your site's webpages where these and other widget's may be placed by clicking and dragging the widgets down from the console into the various rectangular compartments displayed.



Under the Layout page title, is the **Site section** selector. Click on the adjacent button, and choose “**All Sections**” from the drop-down menu. This will enable you to choose certain structural elements which will appear on all sections of your website.

4) Editing Site Info

In the layout for All Sections, the “**Site info**” widget should remain in the center top frame.



Click the small blue gear symbol to personalize the “**Site Info**” widget.

Title: Your Name

Description: Ph.D. Candidate in Economics

Leave Address lines blank.

Deselect the “Enable contact form” box, which is enabled by default.

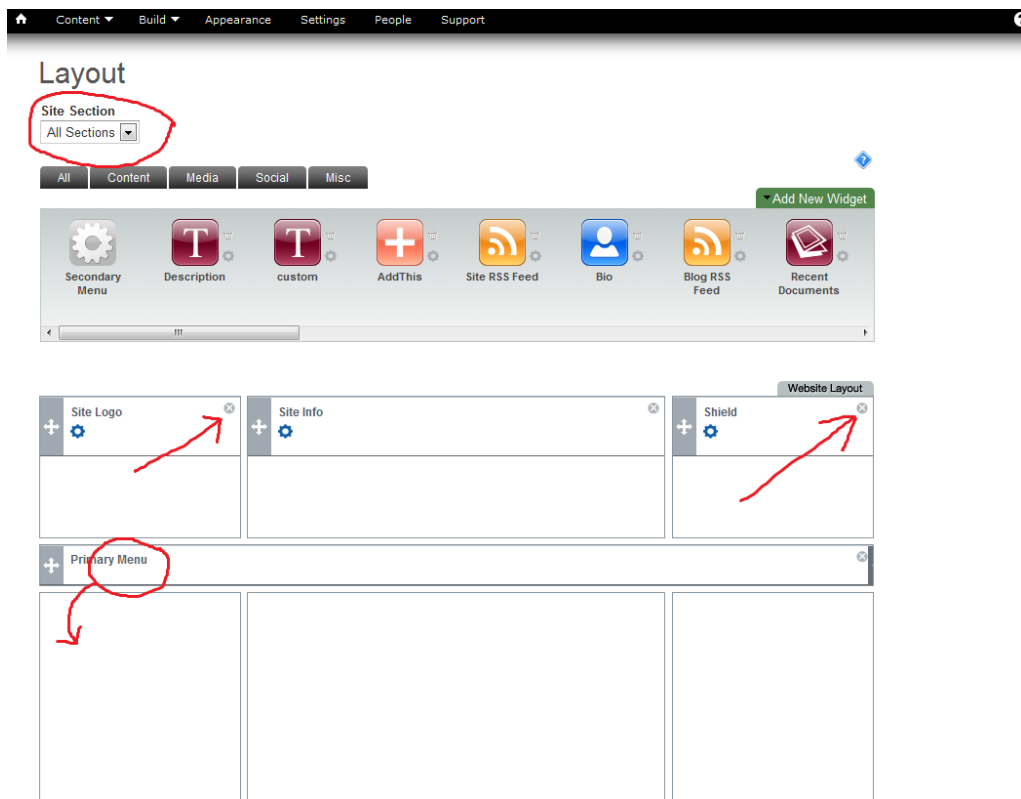
Click the “**Save**” button at the bottom of the window.

After saving here, the editing window might not close automatically. If it doesn’t, close the window if necessary by clicking the big X in the upper-right hand corner (this seems to depend on which browser you are using).

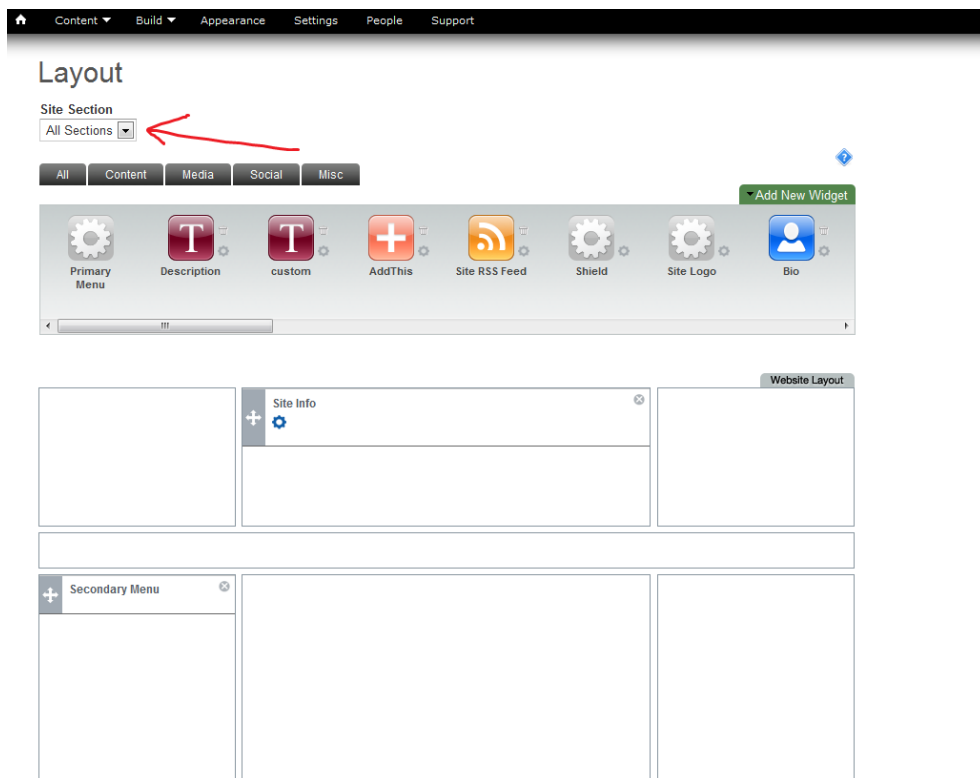
5) Removing or Relocating Widgets

To remove widgets that don’t fit the standard layout, you would click the little X in the upper-right corner of each non-econ widget. This moves them up the gray Widget Selection Panel across the top of the layout section. If you accidentally remove the wrong one, you can drag it back down into your layout.

- Remove “**Site Logo**” and “**Shield**” widgets.
- Drag the “**Main Menu**” widget down to the horizontal layout column on the left side.
- Click the “**Save for...**” at the bottom of the page.

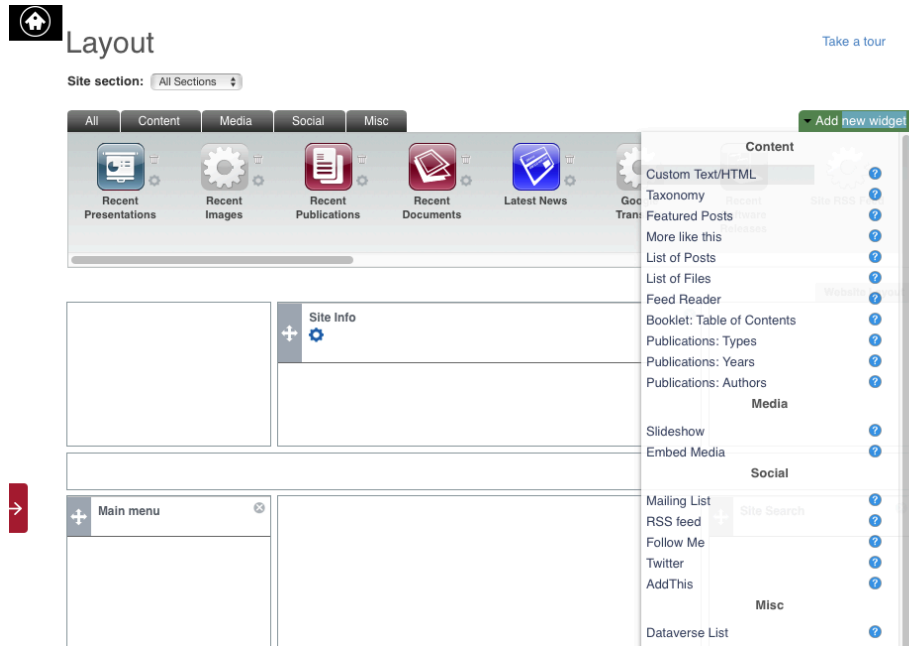


So Far the Layout Should Look Like This:



6) Creating the Economics Affiliation Widget

Click the green “Add new widget” tab in the upper right corner of the Layout window,
Select “Custom Text/HTML” from the resulting drop-down menu.



The “Add New “Custom Text/HTML” widget editing window will open.

The screenshot shows the 'Add New "Custom Text/HTML" Widget' editing window. The window has a title bar with a close button (X). Inside, there's a 'Widget Description' field with the text 'Affiliation Module' and a small red asterisk indicating it's required. Below it, a small text says 'A brief description of the widget. Only displayed in the Layout section.' There's a 'Widget Title' field below that. Below the title field, a small text says 'The title of the widget that is seen by your visitors.' The main area is labeled 'Content' and contains a rich text editor with various formatting tools (bold, italic, underline, strikethrough, text color, background color, link, unlink, list, indent, outdent, undo, redo, source, preview, font size, font family). Below the editor, there's a 'Media browser' button. At the bottom, there's a 'body p' text area. Below that, a small text says 'You can put almost anything into here to place it in a widget. Text, HTML, Images, Video, whatever works in the editor.' There's a checkbox labeled 'Make Embeddable' which is currently unchecked. Below it, a small text says 'Allow this widget to be embedded on other websites.' At the bottom, there are 'Save' and 'Cancel' buttons.

Make the following changes:

Widget Description: Affiliation Module

Widget Title: Leave Blank

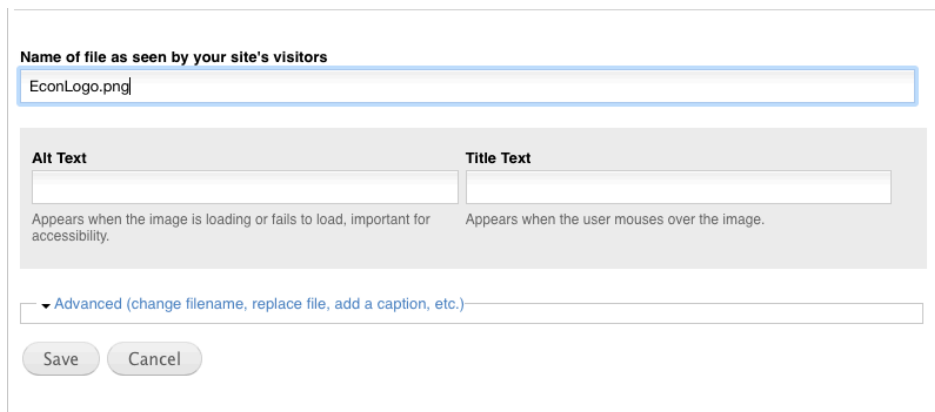
Click inside the **Content** text editing block, make the cursor active.

Click on the “**Media browser**” button.

The file manipulation window will open, asking for the location of the file with which you would like to work.

Either Drag and Drop the “**EconLogo.png**” file you received along with these instructions to the manipulation window, or click “**Select files to Add**”, locate the file wherever it resides on your computer, then choose it.

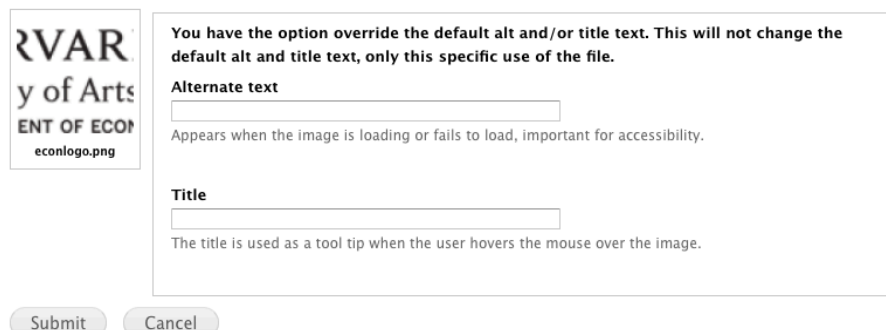
In a moment, once the file has been successfully uploaded, yet another window will open, asking you to add information pertinent to the file.



The screenshot shows a file manipulation window. At the top, there is a text input field labeled "Name of file as seen by your site's visitors" containing the text "EconLogo.png". Below this, there are two side-by-side text input fields: "Alt Text" on the left and "Title Text" on the right. Under the "Alt Text" field, there is a small note: "Appears when the image is loading or fails to load, important for accessibility." Under the "Title Text" field, there is a small note: "Appears when the user mouses over the image." Below these fields, there is a link that says "Advanced (change filename, replace file, add a caption, etc.)". At the bottom of the window, there are two buttons: "Save" and "Cancel".

No other information is required, so click on the “**Save**” button. This will trigger the Embedding window, asking you to submit the uploaded image to your newly created widget. Click on the “**Submit**” button.

Embedding *econlogo.png*



The screenshot shows an "Embedding" window for the file "econlogo.png". On the left, there is a thumbnail of the image, which is a logo for "UNIVERSITY of Arts and Sciences" with "ECONOMICS" below it. To the right of the thumbnail, there is a text box containing the following text: "You have the option override the default alt and/or title text. This will not change the default alt and title text, only this specific use of the file." Below this text, there are two text input fields: "Alternate text" and "Title". Under the "Alternate text" field, there is a small note: "Appears when the image is loading or fails to load, important for accessibility." Under the "Title" field, there is a small note: "The title is used as a tool tip when the user hovers the mouse over the image." At the bottom of the window, there are two buttons: "Submit" and "Cancel".

You are then returned to the open Add New “Custom Text/HTML” widget window:

7) Creating the Contact-Info Widget

The “**Contact Info**” widget is created using almost the same procedure used for creating the “**Affiliation Module**,” except that:

- The widget is titled “**Contact Info**.”
- Your the contact information is typed or copy-and-pasted into the Content editing block.
- No images are required.

Remember to click the “**Save**” button when you are finished.

8) Creating the Advisors Widget

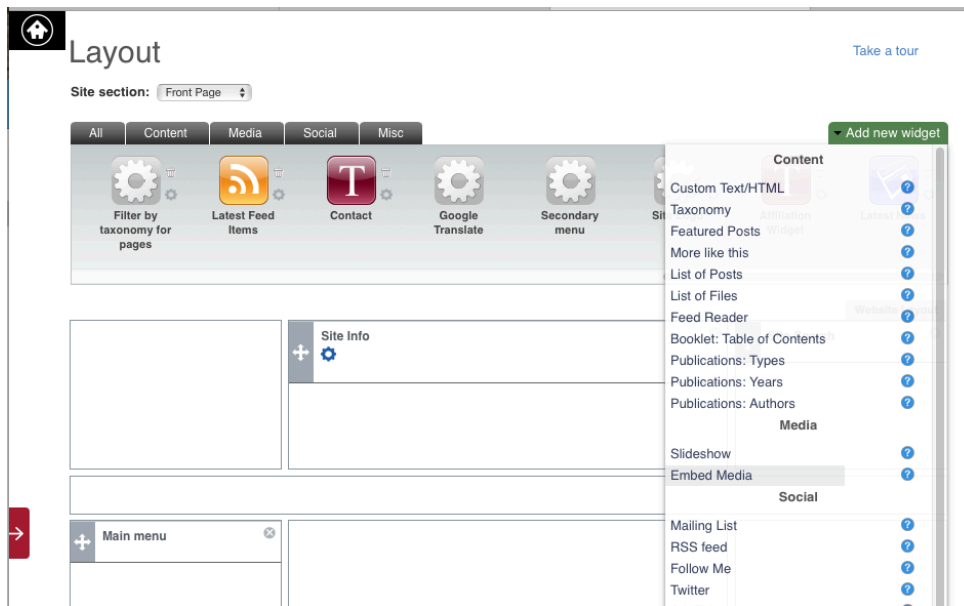
Again, this is the same procedure as the “**Affiliation Module**” widget, except with the addition of information for your advisors.

- The widget is titled “**Advisors Widget**.”
- Information about your advisors is typed or copy-and-pasted into the Content editing block.
- No images are required.

Remember to click the “**Save**” button when you are finished.

9) Creating the Photo Widget

For creating the Photo Widget, you use a similar procedure as for creating the “**Affiliation Module**” widget, though instead of selecting an empty “**Custom Text/HTML**” widget from the “**Add New Widget**” drop-down menu, select the “**Embed Media**” widget from the **Media** section.



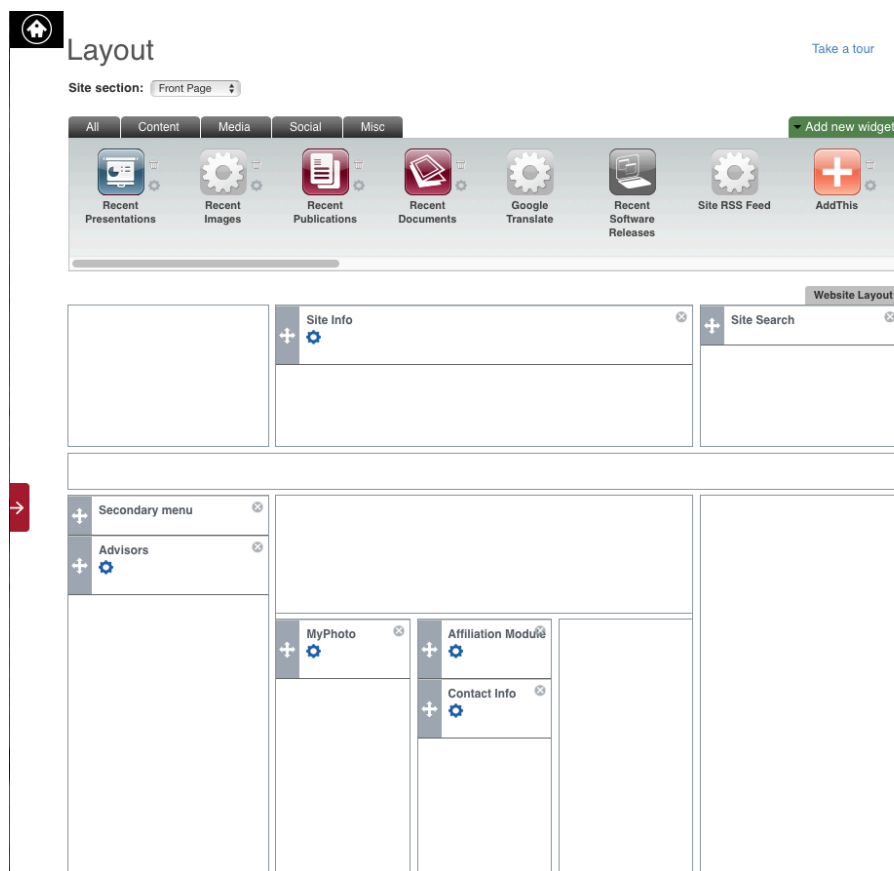
Once the “**Embed Media**” widget editing window opens:

- Add the **Widget description**: MyPhoto
- Upload your photo to the widget (Your photo should be no smaller than a passport photo, no larger than approximately 4 inches square.).
- Remember to click “**Save**” when you are done.

10) Configuring the Economics Standard Layout


- Position the “**Contact Info**” widget below the “**Affiliation Module**” in the center lower layout compartment.
- Place your “**MyPhoto**” widget in the compartment just to the left of the “**Affiliation Module**.”
- Don’t forget to click **SAVE** at the bottom.

This is how the final Front Page of the standard layout should look:



Click on the home symbol in the upper-left corner of the Layout page to see what will be the public side of your site.

It should appear like this example: <http://scholar.harvard.edu/cage>

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You can now add your academic material to the Bio/CV and Publications pages by clicking on their respective links in the navigation menu on the left. Documentation for using both can be found on the excellent [Open Scholar Documentation](#) website.

Making Your Site Publically Available

- Click “**Settings**,” then on “**Advanced**” on the Admin console. Your site’s “Settings” page will open.
- Scroll down to the “Privacy” section, click on the button next to “**Public on the Web.**”
- Please let Peter Brown know when you are ready to have your new site linked to your grad student citation on the Economics Dept. website.

Support

If you have any questions about creating your OpenScholar site, please write to: ithelp@harvard.edu If you need additional help, please don’t hesitate to contact Peter Brown at pbrown@harvard.edu