LibGuides v2 Training

Friendly URL for this page

- http://tinyurl.com/UWlibguides2training

Go Live Date: Tuesday, January 6th

Accessing & Logging In

- Login at https://wisc.libapps.com/
- Required to set a new password when first logging in. Passwords are case-sensitive and must be at least 8 characters long containing at least one number or symbol.
- Springshare brings together its v.2 applications in one login screen. The other Springshare application to which the Libraries subscribe, LibAnalytics, is not yet available in v.2, so login to that in the way to which you are accustomed.
- Login to LibApps Dashboard. Choose LibGuides from the LibApps drop-down menu.

Navigating/Guide Editing Screen

- **LibApps Dashboard Toolbar**
  - LibApps drop-down > LibGuides
  - Home takes you back to LibApps Dashboard
  - My Account - change e-mail, name, password
  - My Profile - this is where you edit your profile, check to see if extra spaces or characters
  - Image Manager - this is where you edit your profile, check to see if extra spaces or characters
  - Help - need to click on LibGuides at top to access LibGuides help

- **LibGuides Dashboard Toolbar**
  - Home takes back to LibApps Dashboard
  - Content - Guides (all guides in system; things you can do in v1 that you can't now do in v2, apparently changes coming), Assets (all assets), Image Manager (personal library)
  - Tools - Widgets, Link Checker
  - Statistics (Guides, Assets) - Statistics for guide (and page) views are only collected for visitors who are not logged into a LibApps account. Any guide traffic by users logged into LibGuides or accessing the guide via the Preview URL is not included in the statistics for that guide.
  - Help - need to click on LibGuides at top to access LibGuides help

- **LibGuides Dashboard**
  - Left > Springy News
  - Middle
  - Needs Your Attention
  - LibGuides Shortcuts
  - Create Guide
  - Edit Existing Guide - unpublished, published, private
  - Assets - see all content items, can only edit/delete own
  - Generate a LibGuides Widget
  - View Your Image Manager Library
  - Right > Profile box (need to edit under LibApps Dashboard)

- **Guide Information**
  - Title
  - Description
  - Friendly URL
  - Subjects
  - Tags

- **Guide Menu**
  - gear icon - guide info
    - Guide Metadata (CMS Only)
    - Redirect URL
    - Guide Editors (Name editors, no longer can have co-owners, guides you edit show up under Edit Existing Guide, admin account holders will not appear because they can already edit)
    - Access Restrictions (CMS Only)
    - Delete this Guide - Once you delete a guide from the system it is gone. It cannot be restored.
  - image icon - guide style - do not use
    - Guide Navigation Layout (use default, do not change)
    - Prev/Next Links (First, Next, Previous, Last navigation links at the bottom of each guide page - do not change)
    - Tab & Box Options (use default, do not change)
    - Display as Single Page (do not change)
  - eye icon - Preview Guide - view your guide as the public would view it
    - Note public interface will have Guide Contents menu instead of tabs for navigation of guides
• **Change Status To** (Unpublished, Private, Published)

• **Guide Page Options**
  • Add a Page (edit page name under Page Properties below)
  • Page Friendly URL
  • **Page drop-down**
    • Page Properties
    • Redirect URL
    • Visibility
    • Reorder/Move
    • Delete Page
  • **Layout drop-down**
    • 1 column
    • 2 column
    • 3 column
    • 4 column

**Major Changes in the New System**

• **Box Options**
  • Box Types: From many to few but added flexibility
    • **Standard** - after creating box of this type see Add/Reorder, can add and mix and match content of these types:
      • Rich Text/HTML
      • Database - use Link instead for databases in the Database Library, we are not using Database Assets
      • Link
      • Media/Widget
      • Book from Catalog
      • Document/File
      • RSS Feed
      • Guide List
      • Poll
      • Google Scholar
    • **Tabbed** - after creating box of this type use Gear icon to add tabs, can add content of types above.
    • **Gallery** - after creating box of this type use Gear icon to add Label, Caption, Image URL, Image Link URL
    • **Profile** - after creating box of this type use Gear icon to change profile box (e.g., add a colleague as a second "author" or editor)
  • Top/Bottom Boxes that span columns are new.

• **Assets**
  • In v1, content was created within and attached to guides. Wherever that content item is created, that's where the original lives and all reused (mapped) versions are attached to that content item on that guide. In v2, it's a little bit of a different concept. Instead of the content item being stored with the guide itself, it's stored in a central repository of content items (Assets) and associated with that guide/page/box.
  • Asset types included in repository: Link, Media/Widget, Book from the Catalog, Document File, RSS Feed, Poll. Note: Rich Text is not included.
  • To see Assets and filter by ones you own – **LibGuides Toolbar > Content > Assets**
  • When you create a Content Item in a guide, that item will instantly appear in your Assets > Content Item list. Content Items can be mapped or copied. If you delete a content item **at the page level**, the original Asset will remain in the repository, though the individual item will no longer be associated with your guide, page, or box. If you want to permanently delete a Content Item from the system, you must delete it from the Content > Assets > Content Items area.
  • You can reuse links (and pages and boxes and other content items) as before. If you reuse rather than copy you cannot edit or delete; content items, etc. are mapped or linked to the original items. If you make a copy, you "own" and can edit or delete; content items, etc. are copied and independent of original items.
  • Because we are not using the A to Z Database List, databases appear as asset type **Link** and not Database
  • When adding a database link, use Link not Database and be sure to use the database handle (see: **List of Library Website URLs/Handles used in Metalib**).
  • **Co-ownership**
    • It is no longer possible to "co-own" guides.
    • Can have another author as editor and a add profile box of editor.
    • Check to see if previous co-owner is an editor.

**Updating Guides Before and After Going Live**

• **Identifying Possible Problems from Migration**
  • Check to see that images, tables, widgets (e.g., embedded videos, search boxes), or code looks and acts correctly.
  • Check things out in edit and/preview mode. Something might look fine in edit mode, but not preview mode - or vice versa.
  • Check for unnecessary spaces, characters, visible extra HTML tags and delete.
  • Check all the fields of your profile to make sure they look correct. How subjects appear in profiles has changed. Only site administrator (Rebecca Payne) can assign librarians to subjects and the subjects have to be the standard subjects used to organize guides not any other keywords. Rebecca will assign guide owners/librarians to Subjects from http://wisc.beta.libguides.com/ based on what is listed LibGuides v1 to the extent there is a correspondence in words. If guide authors/librarians need any corrections to Subjects as they appear in their profile, they can contact Rebecca. Some authors/librarians may choose not to include subjects.
• The most commonly used simple Ask A Librarian box has been updated with new image to coordinate with new Web site. If you use grid box change the box to simple Ask A Librarian box (in toolkit) by reusing/linking to the box in the toolkit.
• Articles Search box for Primo search works but links and button out of alignment - LibGuides Team will fix. This is also available for reuse/linking in the toolkit.

* Guides and Guide Pages Links - fix after Going Live
  * Look for links to your v.1 site
  * Did you create links to guides, guide pages, or boxes? If so, did you... Use a Table of Contents box? Use a Links to Guides box? Assign your guide and your pages friendly URLs? If you used any of the above methods, then you should be set.
  * However, if you added a link to a rich text box, or to a links box, you will need to update these links manually. In v.1, your guide URLs looked something like this: http://demo.libguides.com/content.php?pid=1234&sid=5678 In v.2, your URLs will look something like this: http://demo.v2.libguides.com/c.php?g=9876&p=5432. The guide IDs (pid= in v.1, and g= in v.2) and page IDs (sid= in v.1, p= in v.2) have also changed, so it's not possible to simply do a search & replace.
  * This is only for links to guides and guide pages. Other links should be fine.
  * URLs ending with something like content.php?pid=154 will redirect to the corresponding guide on your v.2, but not indefinitely. It's a good idea to update these after going live - the guides will load more quickly if they don't have to take the time to redirect.

• Updating LibGuides & Preparing for LibGuides v2 Migration Checklist - Remember to do the updating you may not have done before migration!

Comparing Content in LibGuides v1 and v2

* Access to guides in LibGuides v1
  * Currently can view public homepage and guides at http://researchguides.library.wisc.edu which reflect content in v.1
  * After going live to LibGuides v.2, the domain for LibGuides v. 1 will be http://wisc.v1.libguides.com
  * v1 site will be available at http://wisc.v1.libguides.com for 6 months after v2 site has gone live. After that, it will be taken down.

* Access to Temporary LibGuides v2 Homepage
  * Temporary "public" homepage: http://wisc.beta.libguides.com/
  * When go live, public homepage will be the same as now - http://researchguides.library.wisc.edu

Questions? Feedback?

Contact the LibGuides Team - libguides-l@library.wisc.edu (until Dec. 11) or libguides-lib@lists.wisc.edu (after Dec. 11).

The best source for documentation besides this page is Springshare's LibGuides help. Go to Home > Help > LibApps Help > click on LibGuides at top. Help includes recorded videos.

The toolkit guide will be edited/revised to include best practices and store reusable content.