

# LibGuides v2

# Basics



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# What is LibGuides?

LibGuides is an easy-to-use Content Management System used by many thousands of libraries worldwide. Librarians use it to curate knowledge and share information by creating online Guides on any topic, subject, course, on any process, on anything.

## How can I use LibGuides?

- Create subject, course, or topic Guides
- Use LibGuides as your library website
- Store your A-Z lists for easy reuse
- Create internal guides documenting workflows & procedures
- Create and maintain Staff Profile Pages
- LibGuides is multilingual too!
- Mobile and Tablet-friendly out of the box



Get help wherever you see the black Support button!

## Is this tutorial for me?

Of course! You will especially find this helpful if you:

- Are completely brand new to LibGuides (we hope you love it!)
- Have upgraded to LibGuides v2 and want to learn your way around
- Are a LibGuides v2 admin looking for easy-to-share documentation
- Simply like having your tutorials on paper (and that's okay!)



### Springshare support and training

Our Springies are here to help you get the most from LibGuides!

- Visit <http://support.springshare.com> for the unabridged documentation and our library of recorded training sessions.
- Need some help? Click the Support button in the LibGuides Dashboard!
- Sign up for live training sessions at <http://calendar.springshare.com>
- Chat up the community in the Springshare Lounge at <http://springsharelounge.com>

# How to access LibGuides

You can easily access the LibGuides Dashboard in a few ways.

## Start at your public LibGuides pages

While viewing one of your public LibGuides pages (such as your Homepage), scroll to the bottom of the screen. In the footer, you will see a link that says **Login to LibApps**.



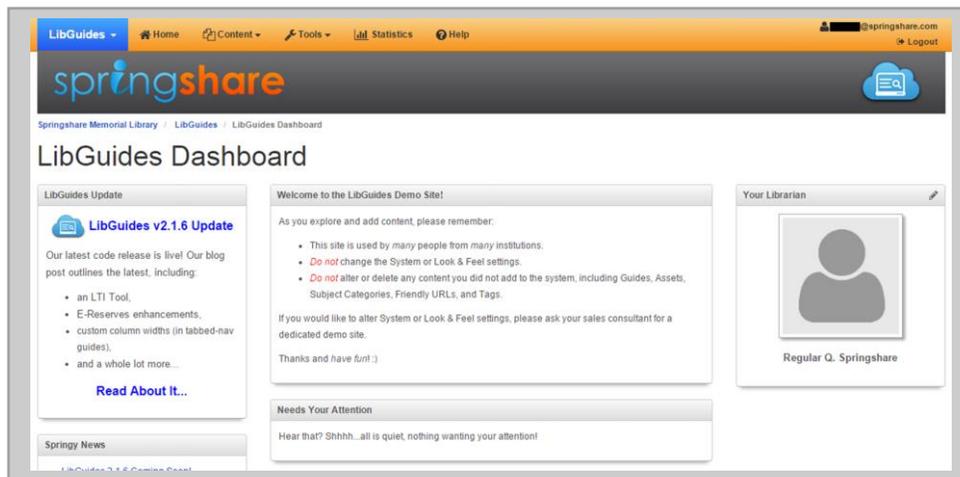
You can quickly access the LibApps login from the footer of any public LibGuides page.

## Login to LibApps

This will take you to the LibApps login page. To access your LibApps account, enter your LibApps email address and password. If you forgot your password, just click **Reset Password** to change it.

## Behold! Your LibGuides Dashboard

You will now arrive at the LibGuides Dashboard. Think of this as your control panel: from here, you can create and edit your LibGuides content.



Your LibGuides Dashboard.

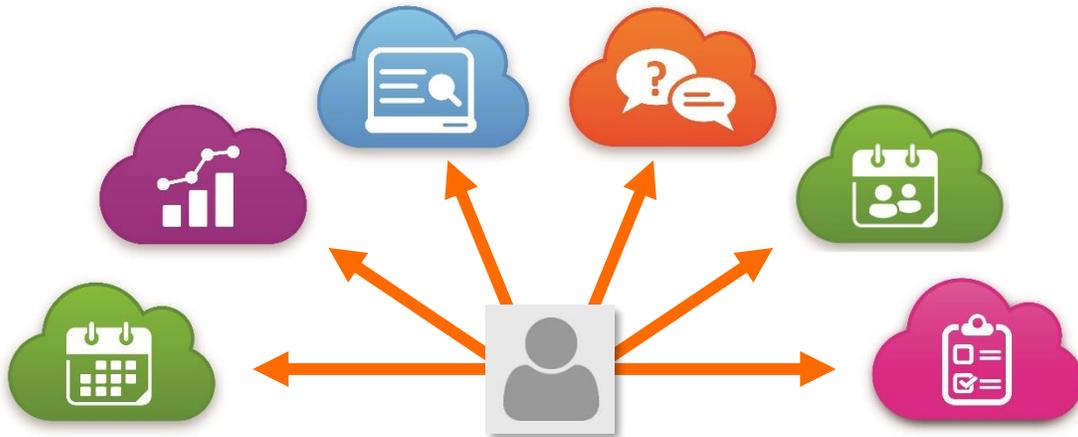


### Tip: Bookmark the LibGuides Dashboard

For quicker access in the future, bookmark your LibGuides Dashboard page in your web browser.

# Your LibApps account

“Whoa, I thought this was about LibGuides? What’s LibApps?” Great question! LibGuides is part of our LibApps platform, which also includes LibAnswers, LibCal, LibSurveys, LibAnalytics-Insight, and LibStaffer. If your library subscribes to multiple apps, then you can sign into them using the same login. You can even switch between them without having to log in again!



Your one LibApps account gives you access to LibGuides and any of the other LibApps products your library subscribes to.

## Managing your LibApps account

You can quickly access your account settings any time from within LibGuides – just click on your email address in the command bar.



The LibApps command bar is where you can update your account and profile.

### My Account

From your account settings, you can:

- Update your email address
- Change your password
- Edit your name
- Provide your job title
- Add a simple email signature (not used by all LibApps)

### My Profile

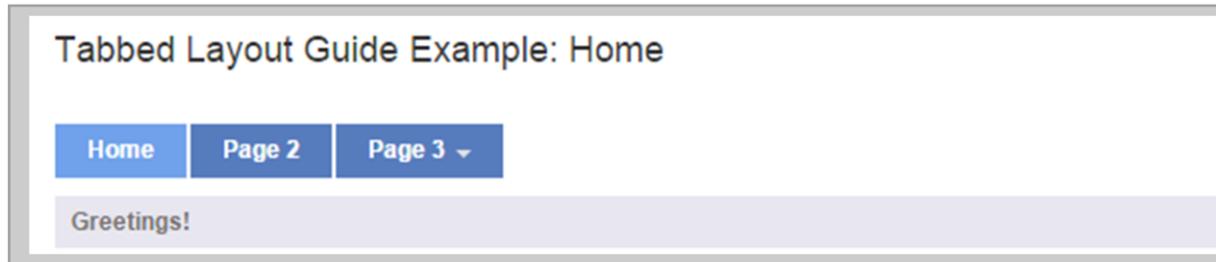
This is what patrons see, including your:

- Profile image
- Contact information
- Social media accounts
- Any LibCal, LibAnswers, or other personal widgets you have
- The visibility of your profile page

To return to the LibGuides Dashboard, simply click on the blue **LibApps** button in the command bar. Then select **LibGuides** from the dropdown. That’s all there is to it!

# How to create a guide

This is the fun part: creating a guide! Although much of the look and feel of your guides can be customized, there are two basic layouts to pick from:



**Tabbed Layout** – what you know and love from LibGuides v1, with navigation tabs at the top of the page.



**Side-Nav Layout** – new to LibGuides v2, this places a navigation menu on the side of the page.

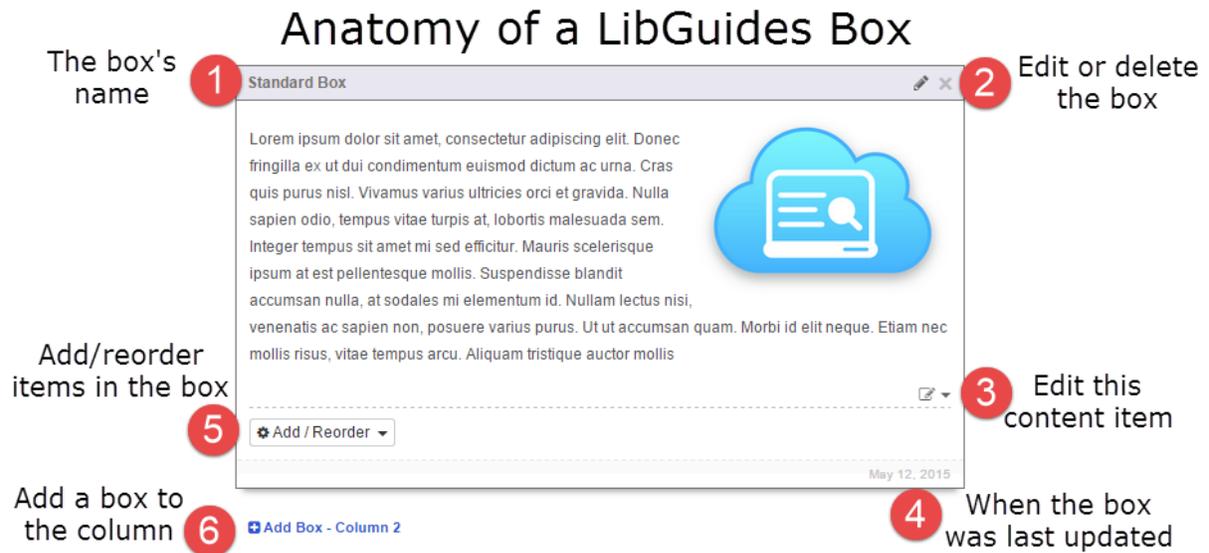
## Creating a guide

1. Create a new guide (two options):
  - From the **Dashboard**: under **LibGuides Shortcuts**, click **Create Guide**
  - From the **Command Bar**: go to **Content > Guides** and click **Create Guide**
2. Pick your starting point (two options):
  - **Apply a template**: if allowed by your Admin, select the Tabbed or Side-Nav template of your choice. (Some admins may require you to use only one template.)
  - **Copy an existing guide**: if you don't want to reinvent the wheel, you can copy a guide from your local LibGuides site, or a guide from the Community. (When copying a guide that is not yours, ask permission first – the guide's creator will be notified.)
3. Give your guide a name and a short description. These appear at the top of your guide.
4. Assign a **Guide Type** (General Purpose is good for getting started.)
5. Choose to enable or disable sharing your guide with the Community.
6. Click the **Create Guide** button. That's it!

Unsure about the best layout or guide type? Don't worry – you can change your settings later!

# Add boxes to your guide

Now that you have a guide, you're ready to create some content. Every guide is divided into pages, and each page is divided into columns. Inside of these columns, you can add and arrange boxes to store your content (such as text, images, and so on).



## Adding a box

1. At the bottom of every column, you will see an **Add box** link. Pick any column and click on that link.
2. Give your box a name – this will be displayed at the top of the box.
3. Choose a box type:
  - **Standard** – contains any number of content items
  - **Tabbed** – contains tabbed sections, each with any number of content items
  - **Gallery** – rotates a gallery of chosen images
  - **Profile** – displays a chosen user profile
4. Choose an initial position for the box in the column (don't worry, you can move it later).
5. Toggle **Floating Box** to hide the box's heading & borders from the public page.
6. Toggle **Draft Mode** on or off for this box. This is helpful once your guide is published, as it allows you to work on your box without displaying it to the public.
7. Click the **Save** button.



### Tip: Reusing existing boxes

When adding a box, you can also reuse an existing box from another guide. Just click on the **Reuse Existing Box** tab and select the box you want to reuse.

# Add content to a box

Once you have a box created, you're ready to put some content in it. There are many different content types you can add, including:

- **Rich Text / HTML:** Add blocks of text, images, and tables to your box using our Rich Text Editor, or by directly editing the HTML code.
- **Assets:** These are reusable items that can include web links, database links, books (w/ cover images), embedded widgets (e.g. YouTube videos), documents & files, and RSS feeds.
- **Polls:** Simple feedback polls that allow users to respond to a question and see the results.
- **Guide Lists:** You can quickly and easily create a list of links to other guides.

## Add a content item

1. In your box, click the **Add / Reorder** button.
2. From the dropdown menu, select the type of Content Item you'd like to add.
3. Create your Content Item (varies based upon what you selected – for full details, see our documentation at <http://support.springshare.com/libguides/addingcontent/assets>).
4. **Save** your changes. Repeat these steps to add additional Content Items to your box.



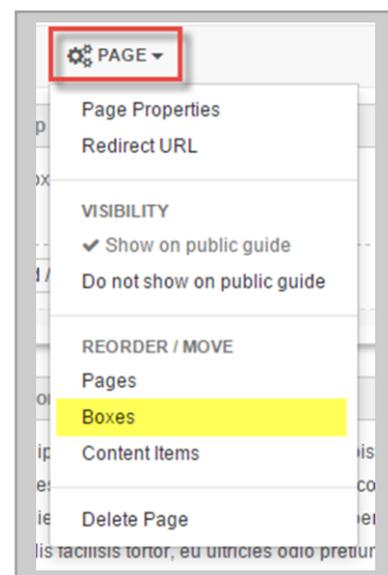
### Tip: Reordering Content Items

To rearrange the Content Items in a box, click the **Add / Reorder** button and select **Reorder Content**. Drag and drop the items to reorder them, then click **Save Order**.

## Reordering boxes

Once you've added more boxes and content items to your page, you may decide that you want to move boxes around in a different order. In LibGuides, it's easy to rearrange boxes in one column, between columns, or even move them to different pages.

1. Click on **PAGE**. This opens a dropdown menu.
2. Under **Reorder / Move**, select **Boxes**.
3. Drag and drop the boxes to reorder them.
4. **Save** your changes.

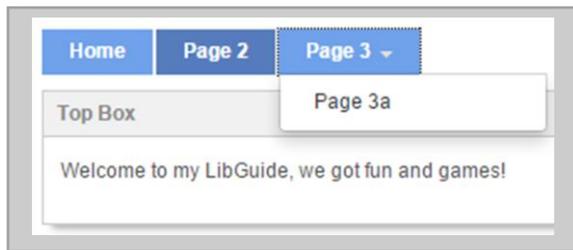


Go to **PAGE > Reorder / Move > Boxes**

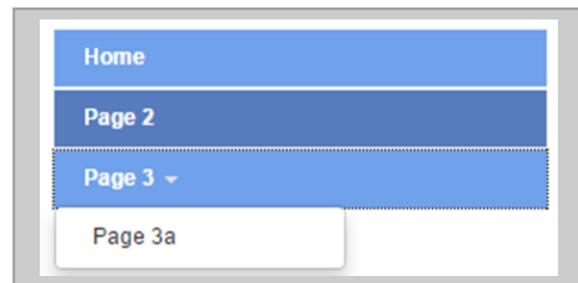
# Add pages to your guide

Sometimes your guides will have so much content that it makes sense to organize them on separate pages. You can add pages in one of two ways:

- **Top-Level Pages:** in Tabbed Layout guides, these appear as new tabs; in Side-Nav Layout guides, these appear as new menu items.
- **Sub-pages:** these can be nested under a top-level page and are listed in a dropdown menu under their parent pages.



How sub-pages display with a Tabbed Layout.



How sub-pages display with a Side-nav Layout.

## Adding a new page

1. Click the **Add New Page** button.
  - **Tabbed Layout:** this appears after the last tab.
  - **Side-Nav Layout:** this appears at the bottom of the menu.
2. Select your page type:
  - **Regular:** a page with boxes and content items.
  - **E-Reserves:** an e-reserves course page (if you have the E-Reserves module).
  - **Discussion:** a public discussion board (if you have LibGuides CMS).
3. Name your page and provide an optional description.
4. Choose a position for your page: top-level or a sub-page (you can move it later).
5. Decide whether or not you want to display your profile box on the page.
6. Toggle **Draft Mode** on or off for this page. This is helpful once your guide is published, as it allows you to work on your page without displaying it to the public.
7. Click the **Save** button.



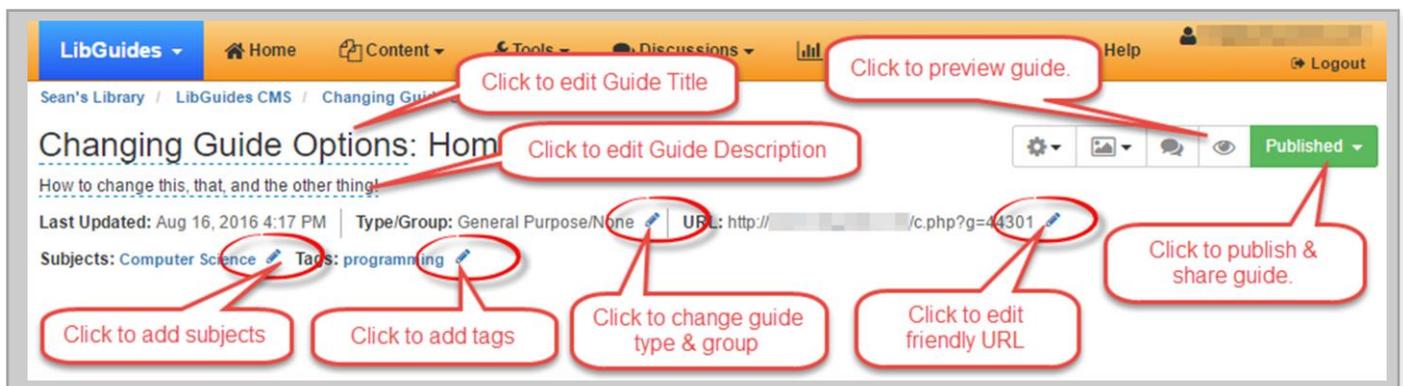
### Tip: Reusing existing pages

When adding a page, you can also reuse an existing page from another guide. Just click on the **Reuse Existing Page** tab and select the page you want to reuse.

# Lights, camera, publish!

You've got pages of boxes, boxes of content, and everything's shipshape & Bristol fashion. Now you're ready to unleash your guide on the world! But before you do, here are some helpful things to consider:

- **Review your guide title and description.** Do they help people quickly understand what's in your guide? To change either of these, just click on them while editing your guide.
- **Create a Friendly URL for your guide.** You can make it easier to share your guide by replacing the default URL with a descriptive Friendly URL. You can do this for individual guide pages, too!
- **Add Subjects and Tags to your guide.** Your admin can create Subject categories that allow you to group related guides together. You can also add Tags to your guides which can help boost the likelihood your guide will be found in search results.
- **Preview your guide early and often.** Always preview your guide after you make changes, just to make sure they look the way you want on the public side.



Things to check before you publish your guide.

## Publishing your guide

1. In the upper-right corner of your guide (under the Search box), you'll see a colored button that lists the current status of your guide:
  - **Unpublished:** your guide is not viewable on your public site.
  - **Published:** your guide is fully viewable on your public site.
  - **Private:** your guide is only viewable on your public site if people know the URL.
  - **Submit for review:** if your library is using the LibGuides CMS Publishing Workflow, this submits your page for approval by your reviewer(s).
2. Click on the status button and select **Change Status and Share**.
3. Choose the **Publication Status** that's right for your guide – and you're done!

# Keeping your guide fresh

Now that your guide published, you'll want to make sure that you keep it fresh and up-to-date. If you need to make changes to your guide, the quickest way to find it is from the LibGuides Dashboard.

## Start at your public LibGuides pages

While viewing one of your public LibGuides pages (such as your Homepage), scroll to the bottom of the screen. In the footer, you will see a link that says **Login to LibApps**.



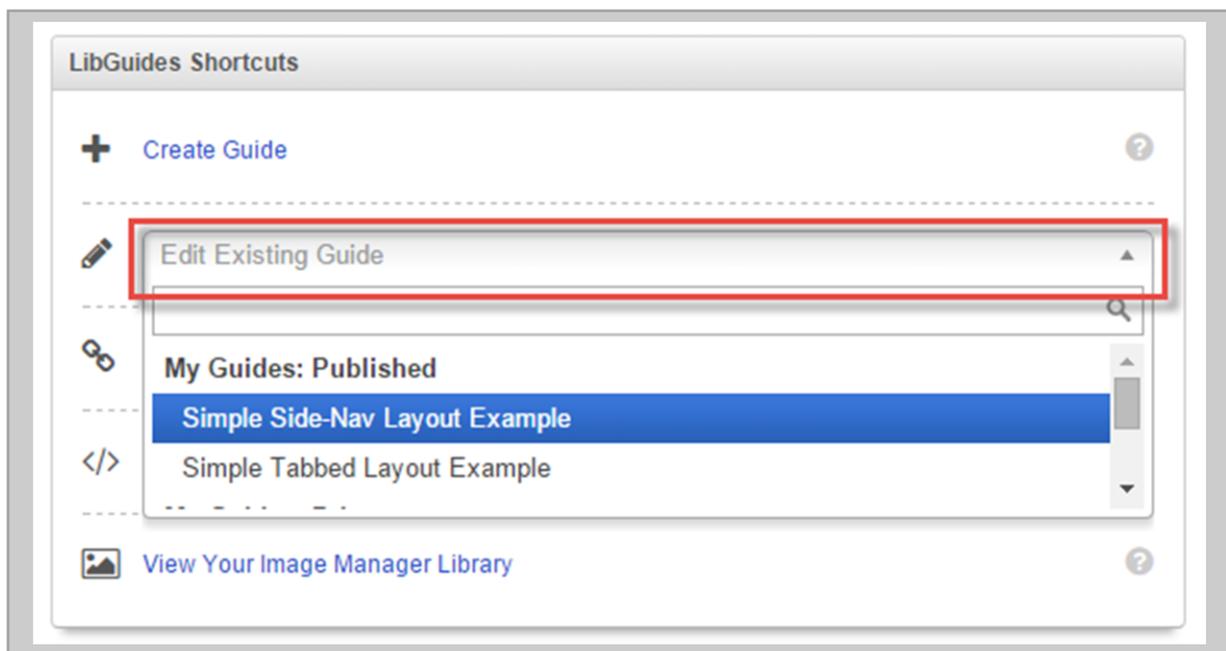
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## Login to LibApps

This will take you to the LibApps login page. To access your LibApps account, enter your LibApps email address and password. If you forgot your password, just click **Reset Password** to change it.

## Select your guide

Under **LibGuides Shortcuts**, select your guide from the **Edit Existing Guide** dropdown menu.



It's quick and easy to edit your existing guides from the LibGuides Dashboard.

# Anatomy of a guide

The screenshot shows the LibGuides v2 editor interface with several callouts pointing to different features:

- Change guide status**: Points to the 'Published' status dropdown.
- Change guide look & feel**: Points to the theme selection icons.
- Edit Tags**: Points to the 'Tags' field.
- Edit Type & Group**: Points to the 'Type/Group' dropdown.
- Edit Friendly URL**: Points to the 'URL' field.
- Preview your guide**: Points to the preview icon.
- Change Status & Share Access Controls**: Points to the 'Change Status & Share Access Controls' button.
- Edit Subjects**: Points to the 'Subjects' field.
- Add a new page**: Points to the '+' icon for adding pages.
- View sub-pages**: Points to the page navigation tabs.
- Adjust column layout**: Points to the 'LAYOUT' dropdown.
- Reorder & move stuff**: Points to the 'REORDER / MOVE' menu.
- Edit or delete this box**: Points to the edit/delete icons for a content box.
- Edit or delete this content item**: Points to the edit/delete icons for a specific content item.
- Add or reorder content items in this box**: Points to the 'Add / Reorder' dropdown for a content box.
- Add a new box to this column**: Points to the 'Add Box - Column 2' button.

The interface includes a top navigation bar with 'Home', 'Content', 'Tools', 'Statistics', 'Admin', and 'Help'. The main content area shows a 'Simple Tabbed Layout Example' with a title, description, and subjects. Below this are three columns of content boxes, each with its own 'Add / Reorder' menu. The bottom of the page has a 'Bottom Box' and a footer with 'Last Updated: Aug 16, 2016 4:17 PM', 'URL', 'Print Page', and 'Login to LibApps'.