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**ILG Website Guide and Best Practices**

**Review Draft Submitted by ILG Web Team**

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*All decisions about the final content of this publication are made by the*

*Institute for Local Government.*

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**Introduction**

On April 13, 2012 the Institute (with help from our website consultants Digital Deployment) transferred its’ entire website to a new platform. The following guidelines are recommended for all new postings. If you come across a page that does not conform to the following guidelines – please fix or bring it to the attention of the ILG web team.

The objectives of the website instructions and style guide are to:

* Better understand new basic editing functions and provide “how-to” instructions.
* Attain consistency and conformity throughout the ILG website so that the user can easily maneuver and locate resources. *EASY ACCESS FOR USERS*!

Remember these key points as you work on the ILG website:

* Always consider our user as you post and strive for content that is:
  + Easy to find. Logical titles and searchable.
  + Easy to scan. “Scroll don’t click”.
  + Easy to navigate. Does the user know where they are?
* These tools and terms are our friends and will make us more friends – so please use them!
* Table of Contents
* Subtitles
* Bundle, Bundle, Bundle
* ILG Resource Centers
* No page shall be left behind – Tag it!
* Refer to online Help guide under commands menu for more detailed instructional assistance. http://www.ca-ilg.org/help.
* Online assistance is also available through Digital Deployment’s basecamp http://basecamp.digitaldeployment.com/

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**1. ILG Best Practices for Website Content**

**Home page**

* **Carousel.** Carousel stories should be refreshed every month. The stories should represent each program area and relate to a city and a county. The post title becomes the carousel story and should be the only link - do not include additional embedded links in carousel story. Keep text brief and descriptive (text above first break appears as carousel story).
* **Home page Pods and More Form the Institute pods.** Home Page Pods and More from The Institute Pods (bottom of page) should be refreshed once a month and should supplement - not duplicate carousel stories.

**Left Channel (Navigation Terms)**

* Navigation terms should not be changed unless approved by web team.
* All posts should be tagged to a navigation or sub navigation term. The tagged navigation or sub term is displayed in left channel. When you find a post with nothing listed in left channel – tag it! The back arrow is not enough for our users to know where they are on site.

**Center Channel (Posts, Overviews, Document, Profile)**

* **Landing Page.** Each navigation term has a landing page. Pods are displayed on navigation pages. All landing pages should have a title (same as Nav term) and an overview. Landing pages should be a guide to content within that term. Ideally, when we send users to landing pages they should be able to intuitively find related content. E*ASY ACCESS FOR USERS.*
* **Overview.** Overviews default to a gray text box and default to top of page. This is an opportunity to briefly explain section content and include table of contents or links to content within the section. Overviews are searchable.
* **Posts. (See formatting tips in next section)**
  + Use the search function to check for duplication or opportunities to refresh content before adding a new post.
  + All body text should use the "Normal" style, with the exception of section headlines, which should use “Heading 3” for major headings and "Heading 4" for subheads.
  + All posts are to be tagged to a navigation term.
* Bundle content whenever possible. The bundled content field is a versatile reference field for collecting other posts in the system and "bundling" them into the post being created/edited.
  + Enter Post date.
  + Use a table of contents for longer posts.
  + Don’t repeat entire html and pdf on same page – for example, a white paper post should have a brief introduction only with pdf in right channel documents and resources. Repeating full content on one page impairs search engines.

**Right Channel**

* **Pods.** All art and photos should be owned by ILG or come with permission from owner (Funder logo’s). Don’t duplicate pods and post on same page.

ILG Guideline: Pods should not exceed the length of content in center channel.

* **Documents and Resources.** 
  + Place all pdf’s and links in this channel.
    - Repeat center channel links and docs in right channel for easy user access.
* **Related Contacts:**  Display in the right channel.

**2. Logging in and managing your account:**

ILG GUIDELINE: Use your first initial and full last name as username:

John Smith = jsmith

* If you already have a website account, go to <http://www.ca-ilg.org/user> to log in, click the *Log in* link provided in your secondary menu, or use the log in link that appears in the lower left corner of your screen when you hover there.
  1. It’s recommended that staff remains logged in while on the ILG website so as not to skew google analytics data.
* If you aren't logged in, you can do so on the screen that appears. If you are already logged in, your *Log in* link may have changed to *Log out*, and if you go to <http://www.ca-ilg.org/user> you will be on the My Account page, where your username and profile information will appear. *Tip: You can tell you're logged if the Commands menu appears in the lower left.*
* If you cannot remember your password, click the *Request new password* tab and enter your Username or email address to retrieve a new password via e-mail.
* Once you are logged in, you may proceed with editing or adding content to the site.
* **Changing your name or password.** When logged in, go to the *Commands* button and choose *My account*. Click the *edit tab*; on that screen you can change your user name and/or password. Make your desired changes, scroll down and click *Save*.

**3. Commands Menu.** Once you're logged in you'll see a gray *Commands* button in the lower left corner of your screen. Click on it and a menu will appear, giving you shortcuts to various things you can do within the site.

* **Help.** Website guide
* **My account.** The link to your website account page, where you can edit your user name, change your password, etc.
* **Create post.** Allows you to create new content.
* **Manage Nav Terms.** Takes you to the navigation term tree (essentially, our site map), where you can edit, add or reorder nav terms.
* **Manage Post Types.** Takes you to the post type term tree, where you can edit, add or reorder post types.
* **Manage users.** Takes you to a page where you can activate memberships, assign roles, edit users, etc.
* **Log out**. This button logs you out of the site altogether.

**4. Navigation terms.** The navigation menu is based upon a

ILG GUIDELINE: To insure continuity, please inform ILG web team of desired changes to the navigation terms or structure.

vocabulary called *Navigation Terms.* We have the ability to add terms, rename terms, and reorder them. *Keep in mind that most website designs plan for a specific number of links across the top of the page, so adding additional terms to the top level of your navigation may break the layout.*

* Go to Manage Nav Terms on the Commands menu.
* To reorder the terms, grab the handle to the left of a term and drag it to its new location. *Make sure to save the order (button at the bottom of the page) when you're done or your changes will be lost.*
* To rename terms, click the Edit link to the right of the term, under the Operations column. Add a description, make the desired changes and click save.
* To add new sub-terms:
  + Click the Add term tab at the top of the Manage Nav Terms area
  + Give the term a name (keep in mind that this will display in the site navigation, including any drop down and sidebar menus)

***NOTE:***  *When creating new terms, be sure to choose a parent for the term. If you don't choose a parent it will default to "root," which will make it appear at the top level in your navigation bar, as mentioned above*.

**5. Post Types.** Post types are used to manage the way content is displayed on your site, and to restrict the types of content that various user roles can create. Some of your Post types will mirror terms in the navigation, but often there will be others that do not. The post type is displayed in URL unless customized.

ILG GUIDELINE: Adding new post types needs approval of the ILG web team.

When creating a new post, the post type should reflect the type of content you are creating. This will help the user understand what they are looking at.

* **Post** is the general post type. Try to use more specific post types when possible.
* **Case stories**can be topic specific if desired (Healthy Neighborhoods, Local Gov’t 101, Public Engagement, Sustainability)
* **Document** post type is to be used when posting ILG white papers, tip sheets or publications.
* **Event**should only be used for actual events that will have a corresponding entry on our calendar (dates should be specified in the post).
* **Newsletters** are to be used for the different sub-types of *Newsletters* (*ILG Newsletter*, *Sustainability Newsletter*, *Public Engagement Newsletter*). Each newsletter type will have slightly different pre-determined specification for design and look.
* **Profile** post type is for people.
* **Beacon Award Participant Profile** is for cities and counties participating in the Beacon Award Program.

**6. How to Create Posts (Posts, Overview, Case Story, Event, Document, Profile, Pod, Newsletter)**

1. Hover over the commands bar in the lower left corner of the screen and click [+] Create post.
2. Choose type
3. **Title:** Type in a title. Keep it simple but explanatory – as it becomes the URL. You are limited to 128 characters and capitalize titles.

ILG GUIDELINE: Posts and file attachment titles should be succinct and explanatory. (Not necessarily the exact document title) If needed, use subtitles for more explanation.

1. **Subtitle:** Type in a subtitle. *(This field is optional – but encouraged.)*
2. If you are in regular editing mode you will only see/edit: **Images**, **Related links**, **File attachments**, and **Publishing options**. Turn on Advanced Mode (gray button on the bottom right corner of the screen to see more edition options).
   * **Images:** Use the images tab to upload an images to your post. Use “File Browser” to find a picture on your computer or the g-drive. Use the “Remote URL,” to upload a picture from another website onto your post. The first image will display as a thumbnail in the post’s teaser. Click on “Add another item” to upload additional pictures. To place uploaded images into your post, decide where you want the picture to display. Then type in [image:1], [image:2], [image:3], etc. where you want the picture to display in your post. The numbers (1,2,3) reflect the order you have uploaded the photos in.
   * **Image in Overviews:**Copy and drag image to text area from Images. Right click on image and go to image properties. Change alignment to left or right so text will wrap and change to normal text box. If you insert “read more” break in overview the image can show up twice on post unless you remove from main image upload after copying into overview text box.
     + *You can insert pictures in-line with text by turning on advanced mode, but you must resize images before inserting them.*
   * **File attachments:** Posts allow you to upload files from your computer into the file attachments field. Be sure to name your file attachments or they won’t appear on the published post.
   * **Related links:** If your post references another site or document at an external URL, please enter it in this field. Please include a title for each link.
3. **Using advanced mode on posts**: If you have administrator access to the site, you can always engage advanced mode by clicking the *[+] Advanced mode* button in the lower right corner of the screen. Advanced mode enables all fields, including those not normally available in a post.
   * **Custom URL**: See # 9 below for instructions and guidance.
   * **Comment settings:** Most of the time, we do not want to allow people to comment on our posts. Make sure that “Disabled” is selected in this tab.
   * **Bundled content:** Bundled content displays at the bottom of posts. Type in the title of the related post you would like to bundle to your post. The system will search for the post you are looking for and display a drop down menu to choose from. You can also us the Browse button to look through all of the content on the website.
   * **Calendar dates**:
     + *Post date:* Automatically set to the date the Post was created. Used in search and displayed in teaser. If an item in the *Calendar dates* field is set, it will override this date when displayed in the teaser. You may override this date if appropriate. *Using the calendar dates actually places the event on our calendar.*
   * **Video & Multimedia**: See # 13 for instructions and guidance.
   * **Access:** See help menu.
   * **Contact info:** Add contact information for the post when appropriate. The person’s name and contact information will appear on the right hand column (right channel) under a heading “Related Contacts.” Contacts searches our website for posts (similar to bundled content), so the contact person must have a profile before they can be related to a specific post. To add an author who does not have a profile post on our system, use the *Customs author info* under Display setting.
   * **Display settings**:
     + **Include teaser content in full view:** This includes the teaser paragraph on the full view (e.g. when you click on the "Read more" link.) You might want to uncheck this if you want to have a different lead-in paragraph that won't appear on the on the full page view. You can use the teaser break button (the rightmost button) in the editor to define where your teaser will break.
     + **Override “Read more”****text:** Change the "Read more" that usually displays at the end of teaser to something else, like *Read the rest of this post*. Only displays if there is more to read.
     + **Custom author:** This field appears in small type underneath the headline. *Optional.*
4. **Tag** to Navigation Term

* **Carousel posts**. Posts can be displayed on carousel by tagging “home carousel” in navigation terms. Image size for the carousel is 420 x 226. Carousel posts should make use of “Destination Redirect” (see item 9 below) to direct viewers to the correct page.

1. **Publish the post.** When you are ready use **Publishing options** to check “Published.” You can also schedule a date to publish the content, and set the content to automatically archive at a set date.

i) **Click save.**

**7. Different methods for creating posts.** There are two methods for arriving at the "Create Post" screen. The first method is from the Command menu in the lower left, the second is a shortcut using the Channels button in the lower right.

• To use **Command menu**, hover over it and choose Create post.

**To use the Channels method (or short cut),** go to the section of the site you want to post content to and click the Show Content Zones: **Off** button (light grey, lower right of screen) so that it now reads Show Content Zones: On Hover. The areas where you can add content will glow green a bit - typically you'll see this in the main area and the right sidebar area. If you hover over the very top of the main area you'll see [+] Overview, which will allow you to add an Overview at the top of the page. If you hover just below that (or over the first post in the main channel), you'll see [+] buttons for each type of post you can add. If you hover over the right channel you’ll see [+] Pod on landing pages. Selecting one of them will bring you to the editing screen.

***Note:*** *The shortcut version allows for your "post type" and Navigation Terms to be pre-populated based upon the section you were in when you started and the post type you chose when hovering.*

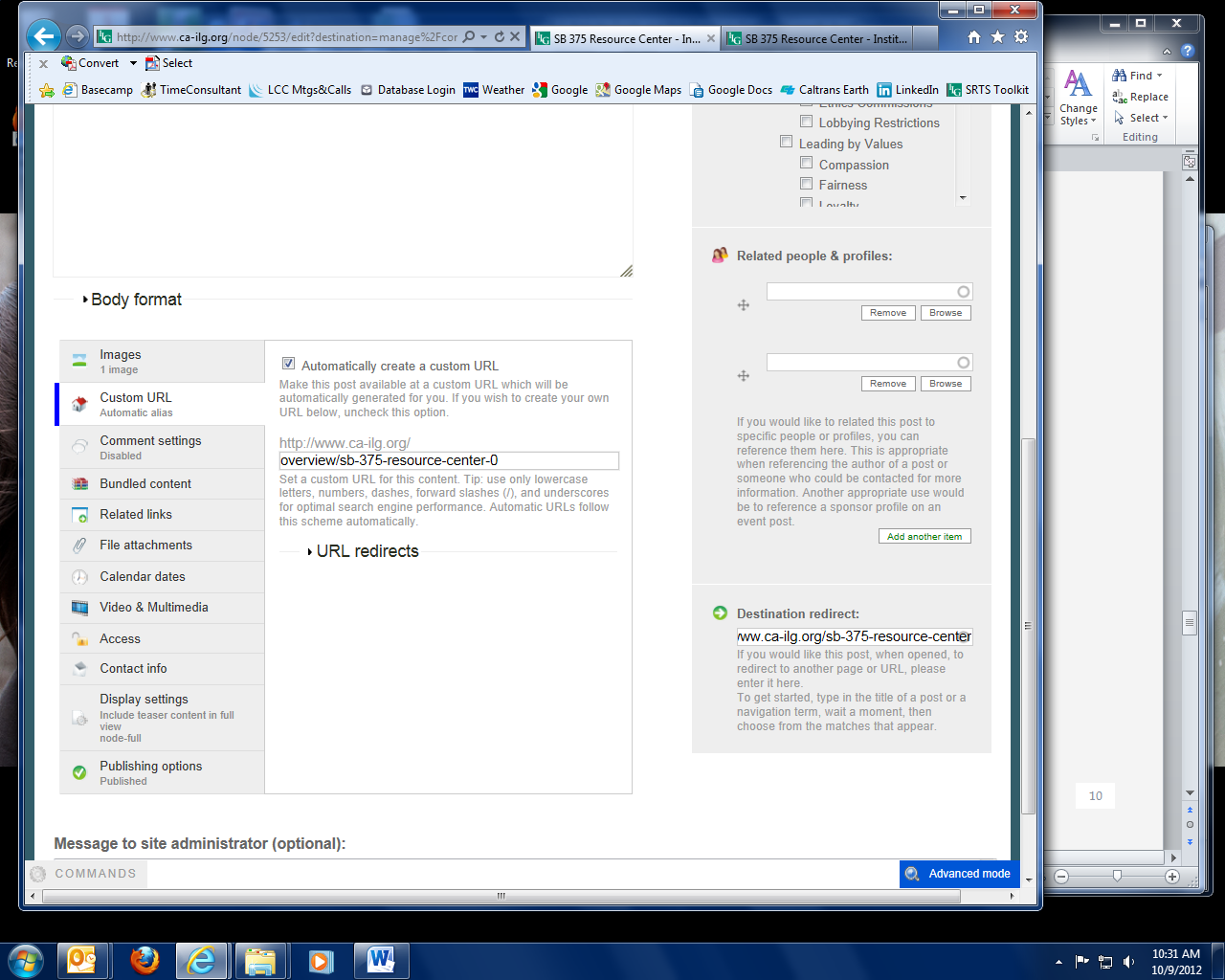
**8. Formatting Tips For All Posts.** Regardless of the post type you're creating, the Body text area features a Word-like editor to help you format your content. Note that if you paste text (copied from Word, etc), the formatting will be removed so that your content starts out clean. You will need to click on “Body format” and select Full HTML to see all of the options described below.

* **Use the drop-down Format box to style your content** (the box that says "Normal" in it, by default).
  + All body text should use the "Normal" style, with the exception of section headlines, which should use “Heading 3” for major headings and "Heading 4" for subheads. To follow convention, you should use H3s first, then H4s, then H5s if necessary.
  + The Address format can be used for footnotes, but most footnotes should be in PDF version of content.
* **Table of Contents.**  There are switches under “display options” that will allow you to create Table of Contents from all H3s and H4s. This breaks your content up into smaller chunks or adds links at the top. If you want to take advantage of these display options, be sure to make your main headings within the body H3s while formatting. The option to Display TOC (table of contents) does not appear under Display Options until after you have designated content as H3s. Select *Show* under Display TOC as the default option is hidden.
* **Bold, Italics and Alignment**: Refrain from bolding or using italics. Left align text.
* **Bulleted Lists:** You can use bullets or numbers to help format lists of information. Bulleted lists are simple: highlight the items you want in your list and click the Bulleted Lists button. To create numbered lists, type your content, highlight everything you want to be included in your numbered list, and click the Numbered List button. If you then want certain subitems in that list to be lettered (second level), highlight just the subitem(s) and click the Indent button to push them in another level.
* **Insert Link:** You can insert a link to another website, to a page within your site, to an email address or to an anchor in the text (more on this in a bit) using this tool. To insert a link, highlight the text in the body you wish to turn into a link and select the button that looks like a globe with a chain link in front of it. A popup will appear asking for the parameters of the link. You can link to a variety of content, but the most commonly used will be URLs and e-mails. Select the link type from the drop-down, type in the address and click ok to set the link.
* **Link to a post within ILG site,** simply paste or type in a link including everything from the first slash after your URL. For example, instead of http://www.ca-ilg.org/node/55, you would simply add /node/55.
* **Remove Link:** Click this button to remove the link in the text (highlight the link first).
* **Anchors:** to add a hyperlink to somewhere within the same post, put your cursor in the spot that will be the destination, or anchor, for the link first. Don't highlight text, just click to put your cursor in the appropriate spot. Click the button that looks like a flag (don't ask us why it looks like a flag but is called an anchor; it's just one of the great mysteries) and name the anchor something brief. Next, highlight the text you would like to become the link to that spot, and click the link icon. In the link type drop-down, choose Link to anchor in the text and then choose the anchor you created in the next drop-down. When someone clicks the link, it will jump them to the anchored part of the page.
* **Insert image inline:** You can use this button to add an image to your content. But this is discouraged. The preferred method is to use the image field, covered later – but if you absolutely have to have an image inline with your text, this is the button to use. Click the image button, then browse server on the next screen. Then you can either choose an image from the file repository, or upload a new one using the "Upload" button. Note: if you're browsing for images you've already uploaded, the folders on your server are on the left. Once you've found the right image, or uploaded a new one, click "ok" on the screen you started with.
* **Quotes:** Highlight the quote or text, use the Block Quote button to create block quotes within your content.
* **Source:** Site Admins have the ability to view the HTML source and make edits there, if desired.
* **Show Blocks**: this is handy when you're formatting content in the editor as it shows where paragraphs break - this is on by default, so turn it off if the formatting is getting annoying. It doesn't affect the actual formatting of your content.
* **Remove Format:** self explanatory.
* **Format dropdown**: mentioned above.
* **Spell Check / Spell Check as you Type:** Note that they are slower than browser-based spell checking, which is available by default in Firefox and Chrome.
* **Teaser Break**: The Teaser button will insert a break wherever your cursor sits. This is great for controlling how much of your post shows up on overview pages, while allowing the entire post to be viewed when the visitor clicks the title or read more. (Site Admins have the option to make a custom teaser that does NOT show up on the full node, under Display settings (see instructions in the Creating Posts section.)

9. **Customizing page URLs** **- making a custom path to a page**

ILG Guideline: Keeping page titles brief and clear creates a better url. Use subtitles for explanation.

* URLs are automatically created for each post based on the title provided at the top of the post when it was saved. This is a good feature that is very helpful for SEO (search engine optimization), but it's also great to be able to create custom URLs that aren't related directly to the page title. A great example of this is a page that says "About our Team" at the top, but that you would like to be accessible at [*http://www.ca-ilg.org/about*](http://www.ca-ilg.org/about)
  1. Visit the post you want to edit. If you are logged in, you will see a *View current* and an *Edit* current tab the top of the page. Select the *Edit current* tab.
  2. Scroll down to *Custom URL* (in the left side vertical tabs, toward the bottom of the post).
  3. Uncheck the box for Automatically create a custom URL and enter the text you want to use for the URL in the box (do not include any portion of the path, i.e. http://www.ca-ilg.org/ at the beginning).
  4. Click save.
* This area of the *Edit Current* page also allows you to customize redirects. You can either create a *URL redirect*, which is an address that will automatically be redirected to this post, or you can create a *Destination Redirect* which will be the destination that visitors will be sent to when clicking on this post (like a pod does).
* The URL redirect is in the center of the page, the Destination redirect is at the bottom of the gray column on the right of the page. See image below:



**10. Managing Content**. There are a couple of different ways you can access your content to

manage it, especially if you want to edit only one post.

* **One post at a time**
* You can navigate to the post you want to edit, and click the Edit button in the Admin Hover bar that appears when you hover over the text. Or you can click the "edit" tab at the top of the post.
* To delete a post, you can edit it, then scroll down and click the Delete button. ***Please note that this cannot be undone!***
* **Managing content in bulk**
* If you want to edit many posts – say, for example, you want to find all of your posts tagged to "About Us" and add the Navigation term "Contact" to them – then Bulk Operations is the way to go.
* Click the Manage content button in the Commands menu. Select the Advanced tab.
* Adjust the Filter terms for the content you're looking for, then click Apply.
* All of the posts tagged to the section you're looking for will appear below. Click the box at the top of the list on the left (this is the "select all" box). If there are more rows than you can see on the page, a message will appear asking if you'd like to "Select all rows." You would.
* Click the light green box with *Choose an operation* drop down menu above your search results list.
  + Your advanced options will appear as buttons. Click the button for *Modify Node Taxonomy Terms.*
  + On the next page, choose the *Add the selected terms* radio button, then scroll down and select the proper term that you want to add.
  + Scroll to the bottom of the page and click Next, then confirm on the next page.
  + Bulk operations can be used for many things in addition to adding/removing Navigation or Administrative Terms. For example, to publish a pile of posts sitting in unpublished mode, all at once.

**11. Revisions and Unpublished Content.** Each time a page is edited, a copy of the old

version of the page is stored in the revisions log. Revisions enable an institution to allow

more people to edit pages without fear of losing content or having pages changed

without a clear paper trail.

* To view revisions of a page, go the page and choose *Revisions.*
* You will see a list of revisions made to the page and the various users that made them. In some pages there may only be one person editing the page. The note beneath each revision is the text that was entered into the “Log message” box when the user edited a page.
* To view past revisions of a page, simply select the date and time of the revision you wish to see. You can get back to the list of revisions by clicking the *back* button in your browser.
* You can also compare two revisions and see the differences between them.
* **Hide a Page**  **(Unpublished content)**
* If you would like to hide the page to the public and/or save the page as a draft, instead of deleting it altogether, uncheck Published from the Publishing Options vertical tab at the bottom of the page.
* Another option is to publish a page for internal only, which makes it visible only to those with editing permissions.
* **How to Roll Back to a Previous Version of a Page**
* Go the page you wish to revert and choose “Revisions”
* You will see a list of revisions made to the page and the various users that made them. In some pages there may only be one person editing the page. Select the revision you wish to roll back to by clicking *revert* next to the revision.
* Select *Revert* from the confirmation prompt.
* The page will be restored to its previous version, and a the revisions log will capture the change by noting which revision was restored. To revert a reversion, simply follow the same process.
* **Delete a Page**
* Visit the page you want to delete. If you are logged in, you will see a *View* and an *Edit* tab the top of the page.
* Select the *Edit* tab, scroll down and click the *Delete* button.
* Select *Delete* from the confirmation prompt.
* Note: once you delete a page, it will be **removed permanently**. You will not be able to recover it or view the revisions of that page.

**12. Ordering Posts within Terms**

* Overviews and Posts appear within the channel in descending order of post date, by default. When you've posted a bunch of content to an area, it's possible that you'll want to reorganize the posts to control what order they appear in.
* Overviews always stay at the top of the page, above Posts. You can reorder Overviews and you can reorder Posts, but they do not mix, so your Overviews will always stick at the top. You can have one, or multiple, of each in your channels.
* Navigate to the page that displays the Navigation Term you want to re-order posts in.
* Click the *Show Content Zones* button so that it displays***On Hover****.*
* The different areas of your page will be outlined in green, and you'll see green buttons appear at the top of each area. There will be a *create* button and a *reorder* button. (Clicking the *create* button will allow you to add another post of the same type to that area, mentioned above.)
* Click the Reorder button. On the page that appears, click and hold the handle to the left of the item you want to move, drag it to a new location, then "let go." Continue with all items you want to move around. Once you're happy with the order of all the posts, make sure to click the *Save order* button at the the bottom of the page. You can also click on title to order alphabetically.
* Note that you can reorder your Posts by channel - so if a post appears in two sections, the reordering you do only applies to that post in the channel you're currently working on. You can put the post in a different order in the second channel by going there and reordering posts.

**13. Video Integration.** ILG currently uses Vimeo for all video uploads. *https://vimeo.com/user4883800*

* **Adding video to a post**
* In your browser, navigate to the Vimeo page that has the video you want to embed into your site.
* In your website content management system, navigate to the "Create" or "Edit" page of a post. Click the "Video and Multimedia" tab. (Note: you may have to click the "Advanced Mode" button for this tab to appear.)
* Copy and paste the URL of the page where you found the YouTube or Blip.tv video you want to add, e.g. http://www.youtube.com/watch?v=glYJlmLzZd4 into the box.
* The content management system will automatically generate the various embed codes for your visitors automatically.
* The content management system will automatically generate a thumbnail of the video and overlay a play button.
* Video content can also be embedded into the post content by entering the text [video:<and then the number that corresponds to where that clip is ordered>] For example, the top most video would be embedded with the code [video:1], subsequent uploaded videos would be referred to as [video:2], [video:3] etc.
* **Recommended video resolution.** Here are the resolutions we recommend for uploading videos for distribution on the web, although most any resolution will work fine:
  + For 16x9 Widescreen: 854x480 (480p)
  + For 4x3 Traditional: 640x480 (480p)
* **Overriding a video thumbnail**
* You may override the default thumbnail by adding an image to the "Main image" field of the post.
* Browse to the post, click "Edit", and then add the desired thumbnail to the main image field.
* To revert to the default thumbnail, simply edit the post and remove the image.

**14. More in Online Help Guide. Find instructions online for the following:**

* Webforms.
* Managing Users
* Google Analytics – see Help Guide Go to <http://google.com/analytics>

G:\INSTITUTE\Website\Website Instructions and Best Practices\ILG Website Guide and Best Practices Final