

**NC
LIVE** **COMMUNITY
WEBSITE
SERVICE**

BEST PRACTICES & IMPLEMENTATION GUIDE

CUSTOMIZATION

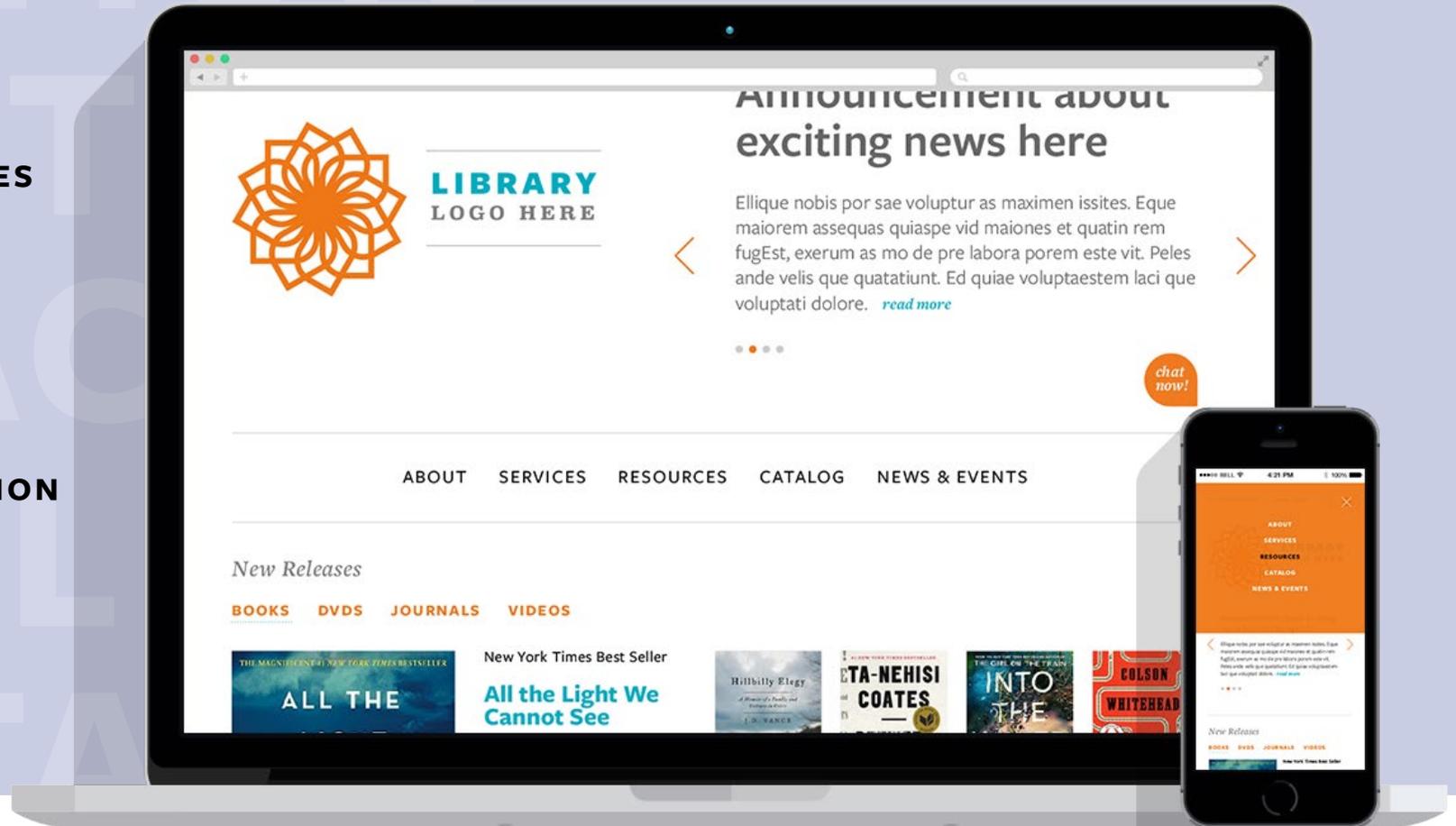
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CUSTOMIZATION

Every library is different, so it is important that you have options to tailor your website to your patrons' needs.

With our template, you'll have the ability to make a custom header, footer, and choose two colors that will accent your LibGuides.

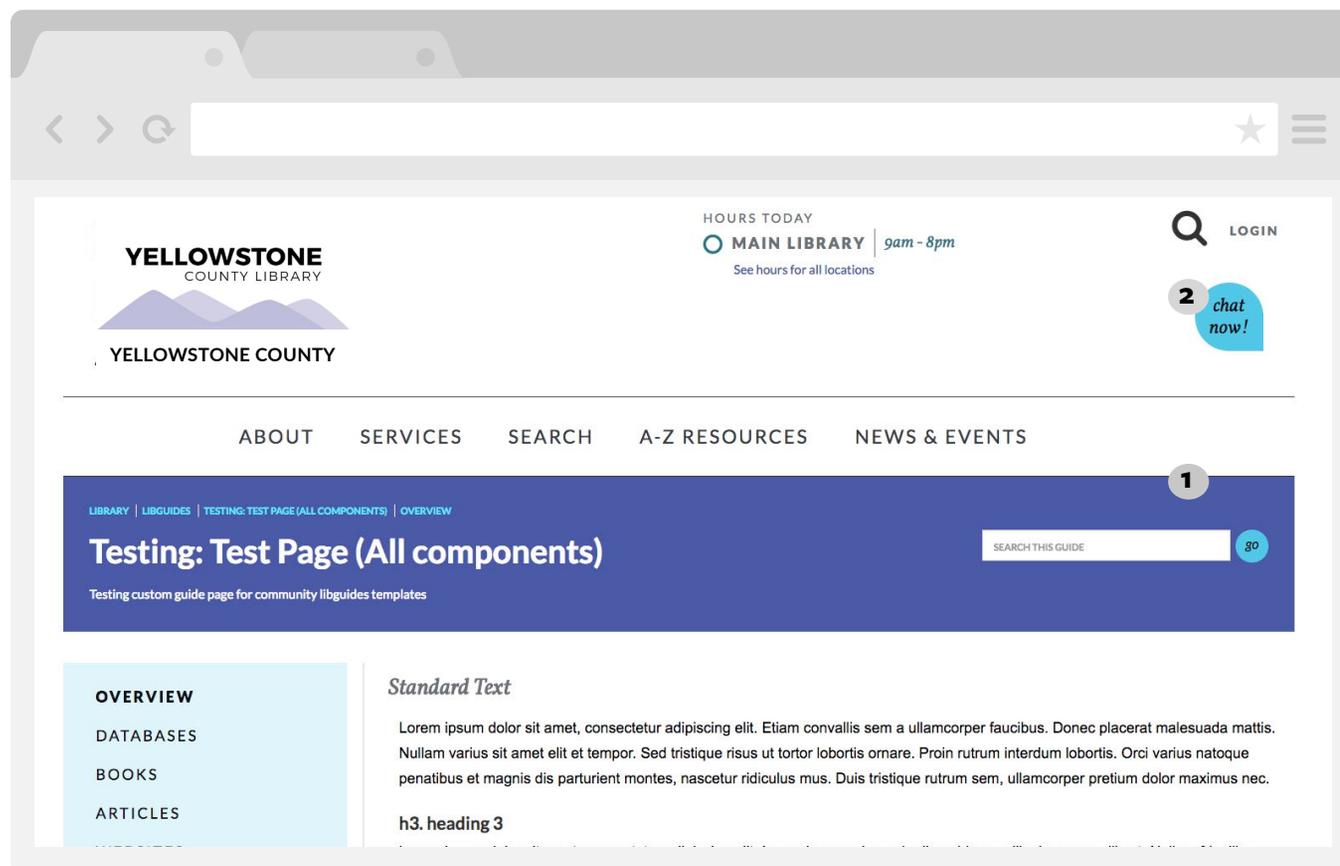
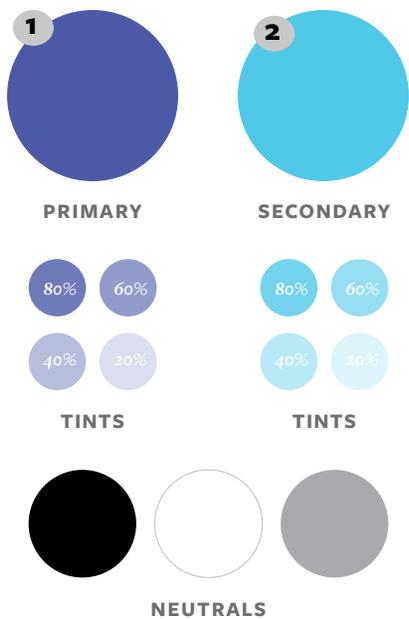
CUSTOMIZATION

Colors

The theme is based on your choice of two colors, **Primary** and **Secondary**. These colors are used to accent your site.

Our application will automatically make tints and adjust your colors to meet [WCAG 2.0 accessibility standards](#).

Read more about choosing colors in the [Best Practices section](#).



CUSTOMIZATION

Header

The website service also provides a number of options for customizing your header.

1. YOUR LOGO

On white background

2. LIBRARY NAME

3. LIBRARY HOURS

Today's hours pulled from LibCal.

4. SEARCH

Search bar that you can configure to search one of the following:

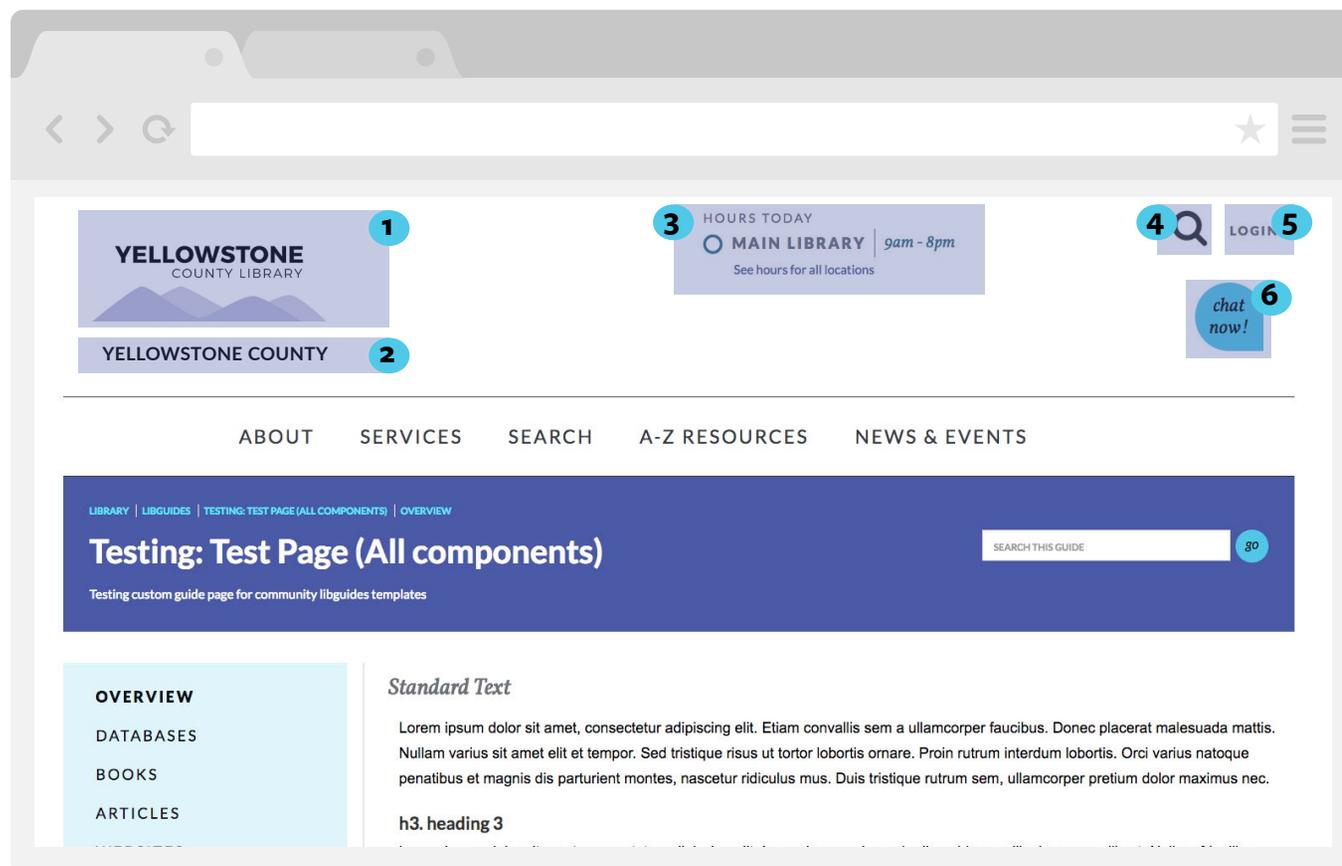
- Your Summon instance
- Your library catalog
- Your LibGuides
- NC LIVE's resource search

5. LOGIN BUTTON

You decide where this login url goes. It could be the patron account of your catalog or a campus system.

6. CHAT HELP

If you have a chat service, you can link it here.



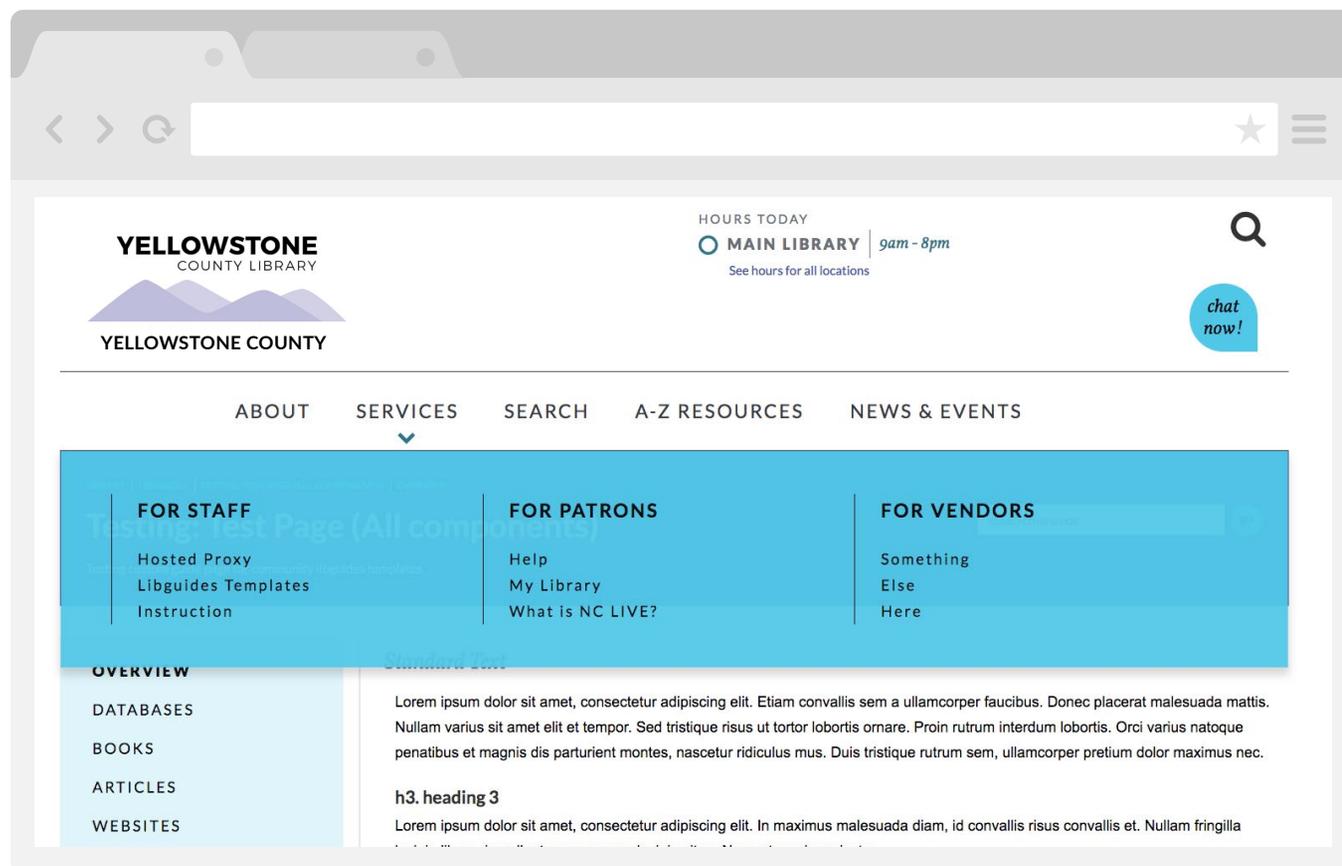
CUSTOMIZATION

Header

In addition to the options above, you'll also have the ability to create your own navigation menu. While this is not required (you can choose to use the default Tab navigation provided by LibGuides), **we strongly recommend our Navigation menu.** The primary reason is that our Navigation menu will appear on all your LibGuides, whereas the Tab navigation is guide specific. Therefore, the only way to achieve a global navigation in LibGuides is to create a custom navigation menu.

Your custom navigation should reflect your site architecture, which you can read more about below.

Our template allows a maximum of 7 links in the main navigation. But each link can open a “megamenu” which can support up to 45 links (3 columns of up to 15 links each).



CUSTOMIZATION

Footer

Footers are a great place to add contact information, social media icons, link to other websites, or links to hard to find content. In our template, you have the following options:

1. YOUR LOGO

2. LIBRARY NAME

3. SOCIAL MEDIA LINKS

Facebook, Flickr, Twitter, Instagram, Snapchat, Youtube, LinkedIn, Pinterest

4. FOOTER LINKS

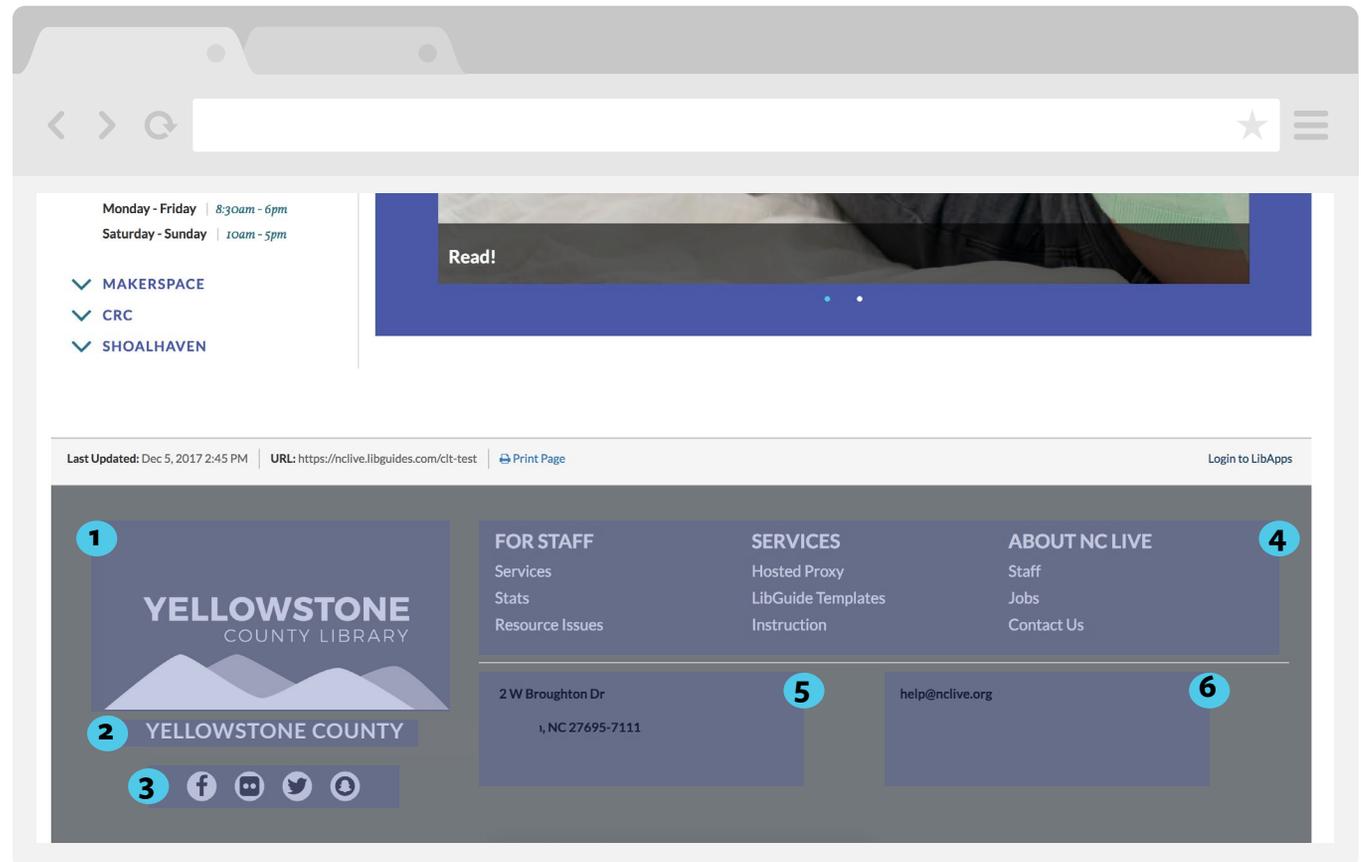
3 sections with up to 5 links each.

5. FREE CONTENT A

Addresses, Contact information, etc.

6. FREE CONTENT B

Addresses, Contact information, etc.



BEST PRACTICES

The Website Service offers a set of styles and scripts you can customize to improve the aesthetics of your LibGuides. The content and organization of your LibGuides is yours to manage, giving you plenty of freedom. For some, this freedom can be overwhelming. Most librarians aren't web developers or designers. So in the following section, we've outlined some best practices for managing your site and these templates. Adhering to these guidelines will ensure a better experience for both you and your patrons.

BEST PRACTICES

Logo & Colors

Highlights

- > YOUR LOGO IS A MAJOR FOCUS OF OUR DESIGN - TAKE THE TIME TO MAKE IT LOOK ITS BEST
- > ELEMENTS OF A GOOD LOGO: FORM

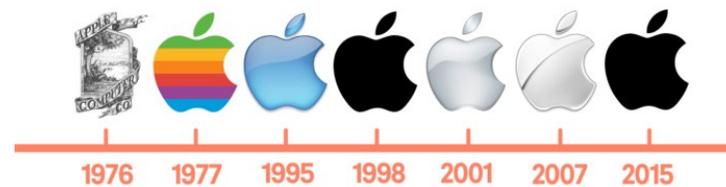
LOGO BEST PRACTICES

Your logo appears in two places in the theme: in the header on a white background and in the footer on a grey background. Your logo is one of the most prominent visual elements on your website, so it's worth investing some time in its design. Below are a few recommendations to ensure that your logo looks its best.

ELEMENTS OF A GOOD LOGO

If you're having trouble deciding whether your logo needs an update, here are a few elements to check in on:

1) Form: A strong logo will not lose any power when it's stripped down to a single color. If your logo is dependent on its palette, then it may be worth finding a new idea/form that can stand on its own. This also allows your logo to maintain brand recognition even as it updates its palette/rendering/texture over time (see Apple examples below).



BEST PRACTICES

Logo & Colors

Highlights

- > ELEMENTS OF A GOOD LOGO: RELEVANCE AND EASY RECALL
- > FILE TYPE: PNG, TRANSPARENT BACKGROUND

ELEMENTS OF A GOOD LOGO, CONT.

2) Relevance: The logo should match the brand of your library. If your vibe is bright and welcoming, then it's okay to incorporate some fun elements into your mark (see Charlotte Mecklenburg Library logo). If your vibe is professional and scholarly, then solid, traditional elements are a better choice (see Chicago Public Library).

3) Easy recall: A logo doesn't need--and indeed shouldn't be--an overly-complicated form. Brand recognition comes more easily when logos are simple. Note also that a graphic is not always required for a powerful logo; sometimes the library name in a strong font does the trick (see NCSU Libraries).

FILE TYPE

Ideally, you'll use a PNG file for your logo because this file type allows for transparency, which enables logos to be placed seamlessly on various backgrounds. If you only have a JPEG file, ensure that the color block background offers balanced and sufficient space around the logo graphic (see examples at right).



NCSU LIBRARIES



BEST PRACTICES

Logo & Colors

Highlights

- > MULTIPLE COLOR VERSIONS ALLOW FOR FLEXIBILITY
- > ORIENTATION: SQUARE OR LANDSCAPE

COLOR VERSIONING

It is useful to have multiple color and/or monochrome versions of your logo for use on both light and dark as well as solid and patterned backgrounds. With multiple logo versions, you're free to choose the version that provides the highest level of contrast (and legibility) for each placement.

On our template, you'll find that a darker logo version is more appropriate for the header, which is set against a white background, and a light logo version looks best in the footer which is a dark grey.

RATIO/RESOLUTION

It's important to make sure that the logo file you use for your webpage is set to an optimal resolution. If the image file is too small, the logo may stretch and become grainy or illegible. If your image file is too large, it may cause a lag in webpage loading time and/or be compressed in a way that negatively affects the quality of the image.

The constraining dimensions for our template logo are 135 pixels high and 555 pixels wide. To maximize the impact and clarity of your logo, we suggest uploading the largest file that fits within those constraints.

To look its best in our template, your logo file should be square, or have a landscape orientation. The width should be no more than double the height, i.e. $\geq 2:1$ width to height ratio.



BEST PRACTICES

Logo & Colors

Highlights

- > CHECK YOUR COLOR CHOICES FOR WCAG 2.0 COMPATIBILITY.

TEMPLATE COLORS

Your LibGuide's theme is based around two colors, **Primary** and **Secondary**. We recommend your **Primary** color pass WCAG 2.0 contrast standards with white text, and your **Secondary** color pass WCAG 2.0 contrast standards with black text.

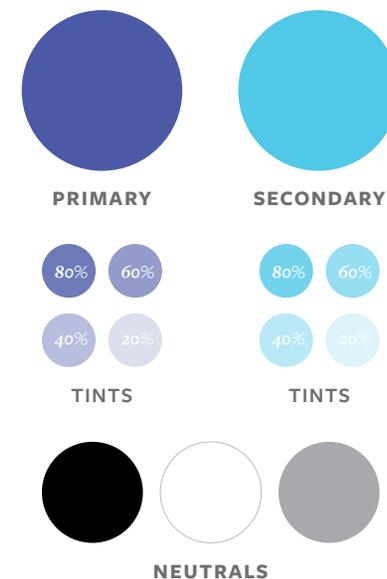


THE ONBOARDING APPLICATION WILL ADJUST YOUR COLORS TO PASS WCAG 2.0 CONTRAST STANDARDS. YOU MAY UTILIZE THE TOOLS BELOW TO AVOID ANY MAJOR ADJUSTMENTS.

How can I be sure that I choose WCAG 2.0 accessible color choices?

Check color choices for WCAG 2.0 compatibility:

- > [WEBAIM.ORG/RESOURCES/CONTRASTCHECKER](https://webaim.org/resources/contrastchecker)
- > [LEAVEROU.GITHUB.IO/CONTRAST-RATIO](https://leaverou.github.io/contrast-ratio)
- > [CONTRASTCHECKER.COM](https://contrastchecker.com)



BEST PRACTICES

Site Architecture

A LibGuide can be anything from an entire site, to a single page with one line of text. Therefore, it's difficult to decide what information goes where and on what LibGuide.

To alleviate confusion, we've created a clearly defined hierarchy of LibGuide types: Homepage, Informational Guide, and Research Guide.

HOMEPAGE

The homepage is a unique LibGuide with no subpages. Its purpose is to draw patrons in, promote, and provide direct access to popular information (such as hours) and services (such as your catalog).

INFORMATIONAL GUIDES

These are LibGuides that contain information about your library and its services. Information should be collected within a theme or informational context. For example, if you have resources for Kids, Teens, and Adults, instead of 3 separate LibGuides for each patron group, create a guide named "Resources", with subpages for Kids, Teens and Adults. We have provided some possible Informational Guides on the following page.

RESEARCH GUIDES

A research guide is a "standard" LibGuide. These guides collect all resources and services for a specific subject, course, or event. We recommend creating an Informational Guide with links to all of your Research Guides. This can be done by making use of LibGuide widgets, which can automatically generate the list of links to your Research Guides. This makes it easier to implement and maintain the Guides.

Highlights

- > THE HOMEPAGE SHOULD HAVE NO SUBPAGES.
- > INFORMATIONAL GUIDES ARE ABOUT YOUR LIBRARY AND ITS SERVICES
- > INFORMATIONAL GUIDES HAVE A CONCEPT AND RELATED SUBPAGE
- > INFORMATIONAL GUIDES ARE UNIQUE TO YOUR LIBRARY AND SERVICES
- > RESEARCH GUIDES COLLECT RESOURCES FOR A SUBJECT, COURSE, OR EVENT
- > CREATE A SINGLE PAGE THAT ORGANIZES ALL OF YOUR RESEARCH GUIDES

But why is it important to organize my site this way?

Your website's architecture is as important as your library's architecture. You may not realize it, but within your library you've created subspaces devoted to specific library tasks and resources: the stacks store and organize your physical books; computing areas allow patrons to utilize electronic resources; your reference desk provides library assistance; even the bathrooms are a specialized place in your library. What if there was no logic to the physical space? Imagine a reference desk surrounded by stacks and not visible to patrons, or a circulation desk at the back of the library when the entrance is at the front. By using these guiding principles, you're creating a navigable path through your website that is intuitive and patron-friendly.

BEST PRACTICES

Site Architecture

Here we have a sample site architecture, with each box representing a LibGuide. Its subpages are listed below.

Example >

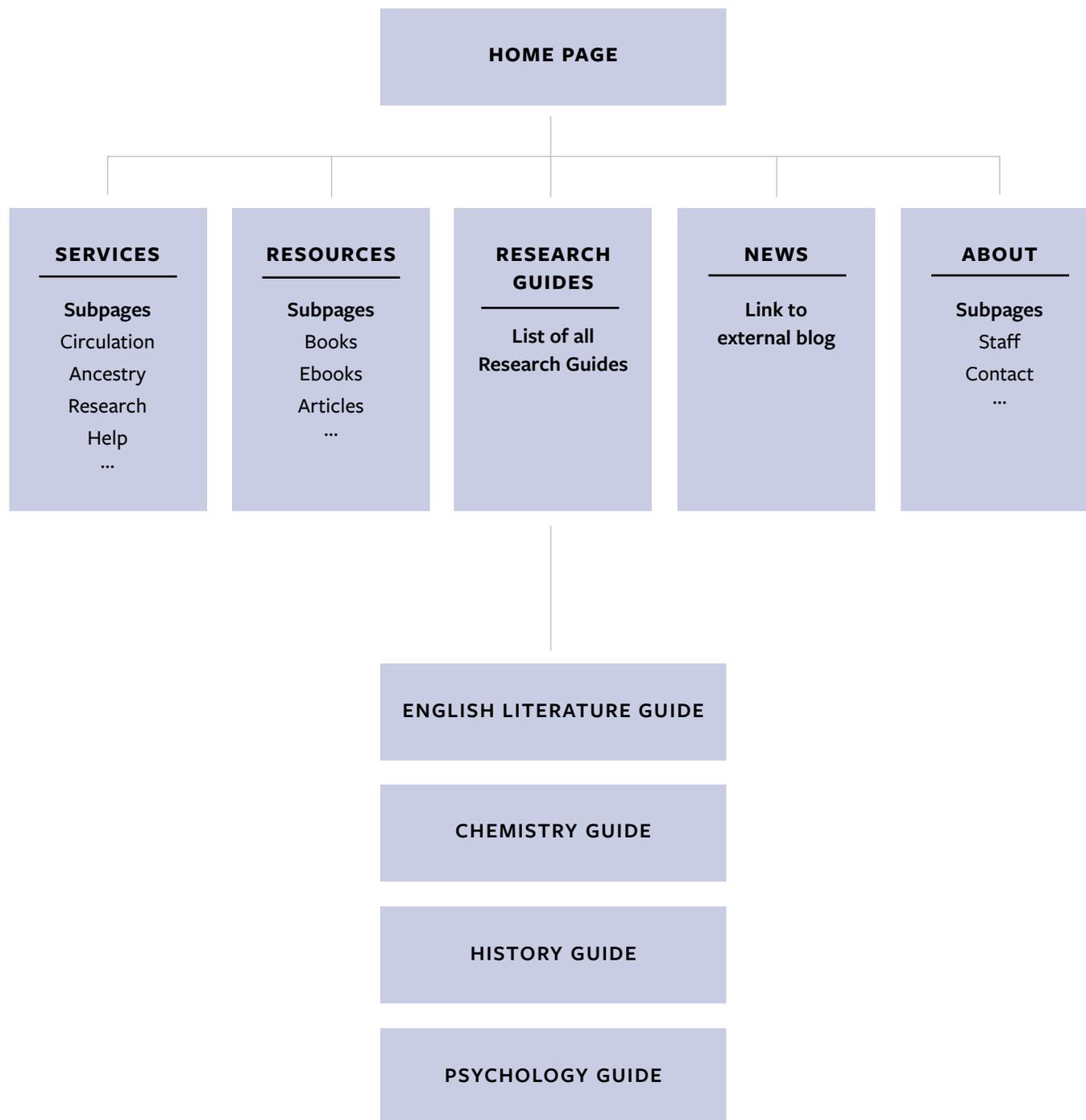
Think about the 4-7 most important sections of your site and place those as your global (top) navigation. Each section will be its own LibGuide, and will be connected to the others via the custom header. This sample site has:

A single **Homepage**

5 Informational Guides: Services, Resources, Research Guides, News, About. The News page could, instead, be a link to an external blog.

4 Research Guides: English Literature, Chemistry, History, Psychology

Note: these guide names and subpages are only examples. The names and content of these pages should reflect the needs of your patrons and the services your library provides.



BEST PRACTICES

Page Content

For all your LibGuides, we recommend a 1-2 column layout. Although 3-column layouts have become popular among LibGuide users, they provide a number of challenges. First, the priority of page content is ambiguous, especially if the widths of the columns vary. 3-column layouts are also naturally “busier,” leaving less white space to allow the patron’s eyes to consume content in digestible chunks. This lack of whitespace can lead to using colors, shapes, or animation to get the patron’s attention, making the page even more busy and disjointed.

1 or 2 column layouts give your content left-to-right, top-to-bottom priority, which is a natural information-parsing structure for any romance-language reader.

HOME PAGE

Homepages should provide two types of content: Quick Access and Featured. Quick Access content is kept in a high priority location and should not be moved (or rarely moved). Your quick access content should be the information that is most often requested or used by your patrons. Featured content could be events, a highlighted resource, or a unique patron story. It’s important to keep your featured content fresh and updated at least four times a year, otherwise your homepage will become stale.

What types of information should be included on my home page?

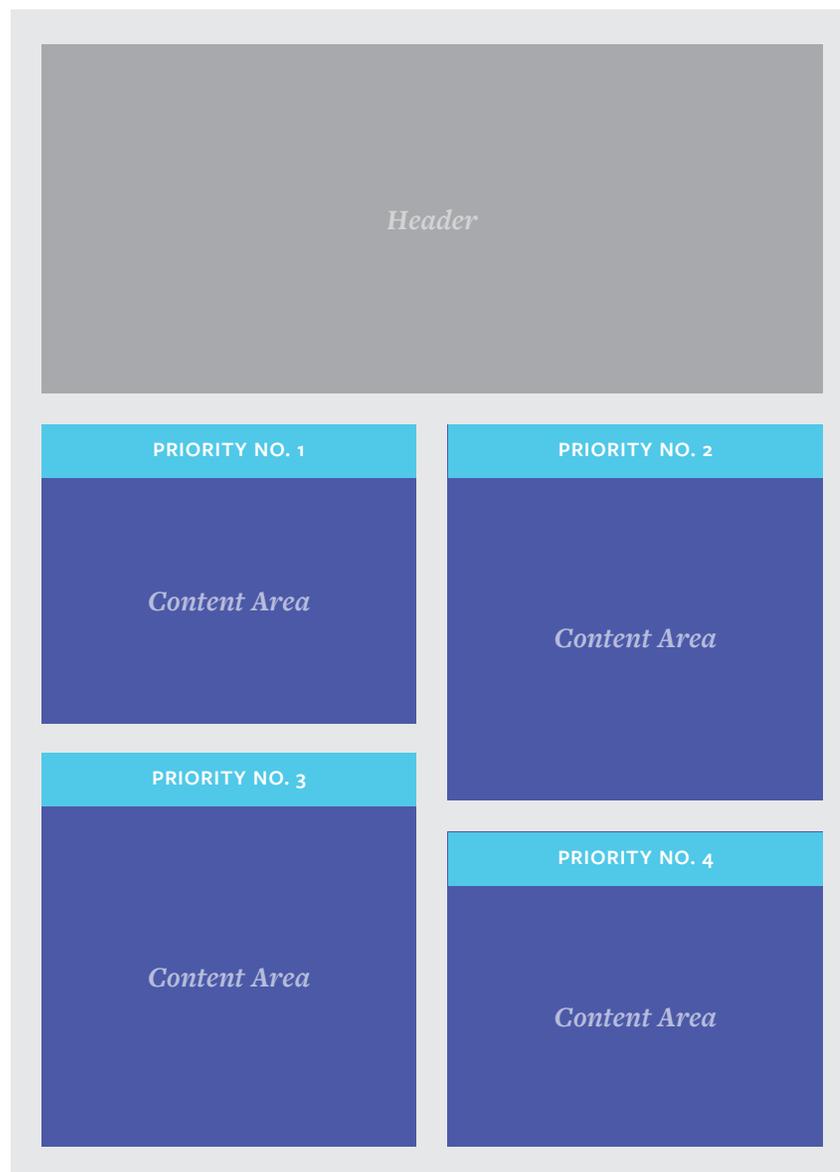
QUICK ACCESS

- Hours
- Contact or Help
- Search
- Popular Resources & Services

FEATURED

- Social Media Feeds
- Events
- New Resources

Example >



BEST PRACTICES

Page Content

INFORMATIONAL GUIDES + RESEARCH GUIDES

Informational and Research Guides adhere to the same 2-column format, with the guide navigation in the upper-left. Supplemental guide content should be placed beneath the secondary navigation. We recommend the supplemental content be consistent throughout the Informational or Research Guide. For example, an “English Lit” Research Guide might have the subject librarian’s profile on every page or a list of “Popular English Lit Resources.” The purpose of repeating content within a LibGuide is to create a pattern for the patron. For example, a patron switching from an “English Lit” to “Psychology” Research Guide would expect the subject librarian or popular resources to appear below the navigation.

Example >

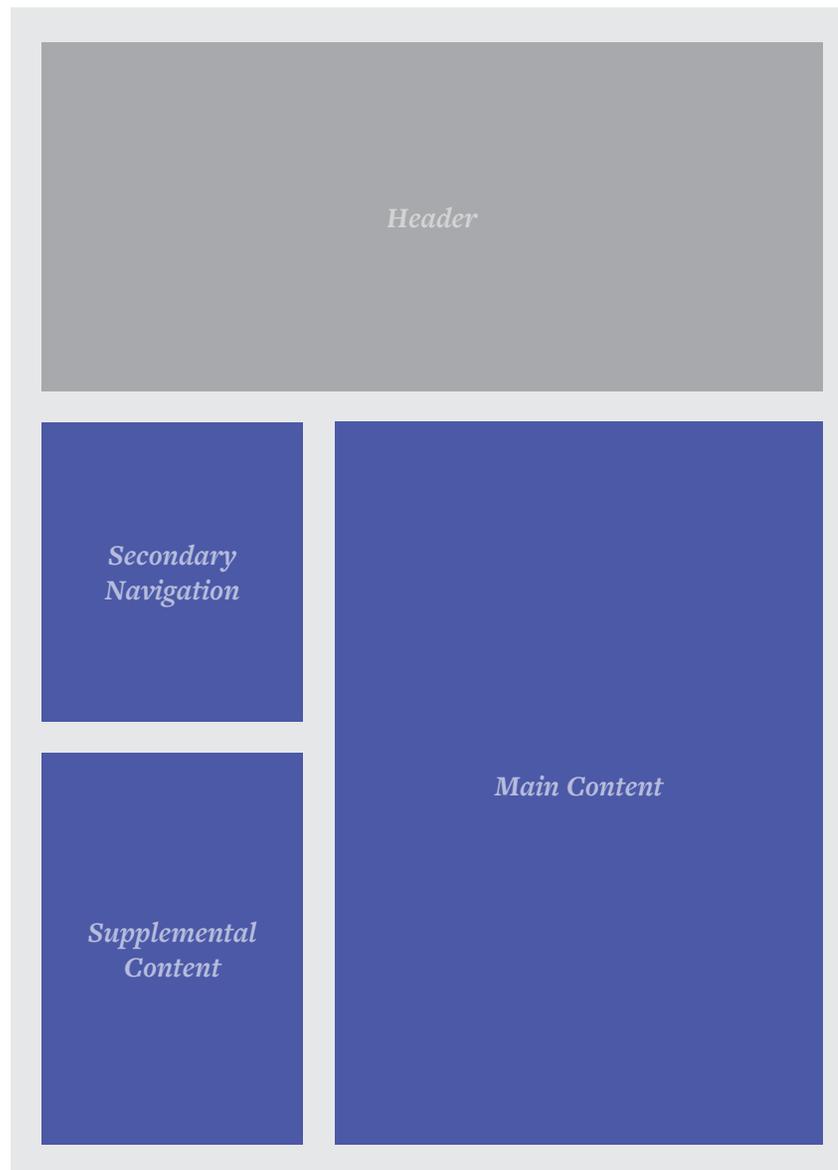
What types of information should be included on information pages and research guides?

SUPPLEMENTAL CONTENT

- Contact or Help
- Librarian Profile
- Popular Resources
- Event Calendar
- List of Related Subjects / Guides

MAIN CONTENT

The main content will be defined by your Guide’s subject matter.



IMPLEMENTATION

Implementation of the website service happens in three phases, most of which can be completed on your own.

Phase 1 involves preparing your current LibGuides for the new styles. You'll need to make sure each of your LibGuides uses the the "Side-Nav Layout." Also, take time to think about your site's architecture and content, and build out all of the new LibGuides.

Phase 2 involves using the onboarding application to configure your custom header, footer, navigation, and colors. Once you have the configuration that you want, test it on your new LibGuides.

Phase 3 is your "Go Live" date. You'll want to pick a date and time when you expect a minimal amount of traffic, but when you'll also have staff on hand to implement the changes.

IMPLEMENTATION

Preliminary Tasks

In Phase 1, you will create a new site “behind-the-scenes.” This will minimize the downtime needed to implement the template and allow you to test your new site without disrupting your current site.

The first step is sketching out your site architecture. Review the Site Architecture portion of this guide and draft a sketch of what you’ll want your site to look like.

From this sketch, you’ll need to create new LibGuides for your Homepage and each of your Informational Guides.

Follow these steps for each new LibGuide you make.

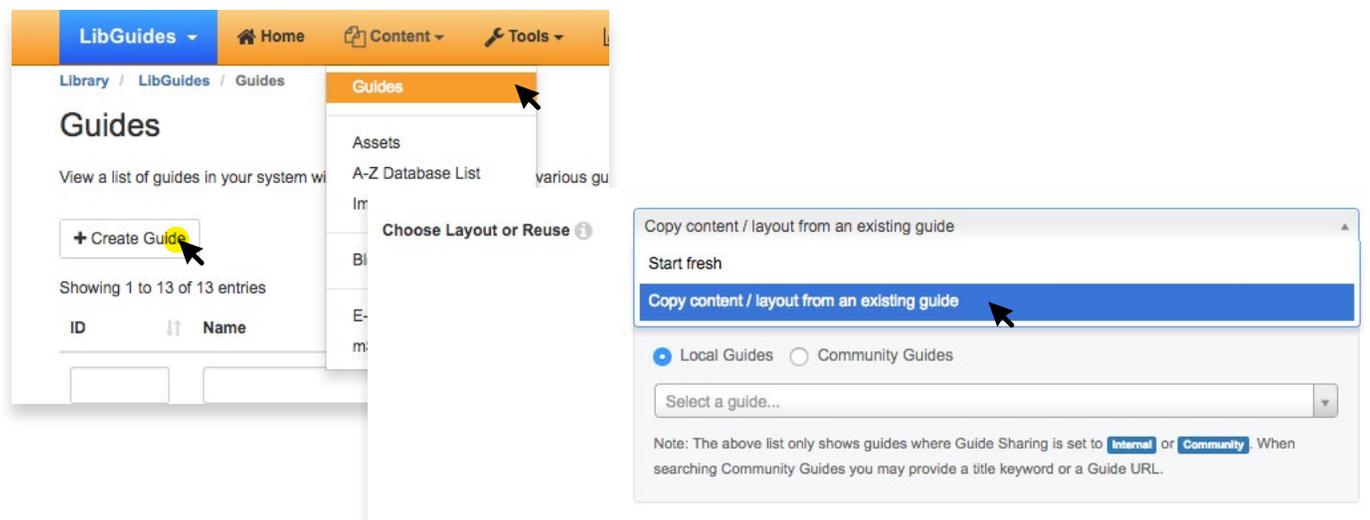
STEP 1

Create a new guide or copy a guide

In LibGuides, you can either make a copy of an entire guide, or you can copy select content from one guide to another. In most cases, you’ll want to make a copy of an existing guide. For example, you might already have an “About” Informational Guide. Simply make a copy of that Guide and continue.

However, if your About information is part of another guide (e.g., your old homepage), you can either:

1. Copy the content blocks from the other page to your new guide (be sure to check the “Copy”)
2. Make a copy of the old homepage and remove all of the other content until you only have the About content



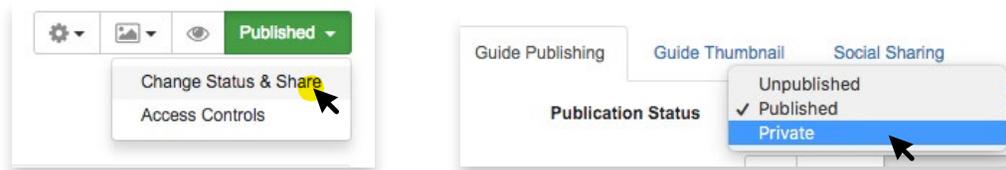
* RESEARCH GUIDES

YOU DO NOT NEED TO MAKE NEW COPIES OF EACH RESEARCH GUIDE. INSTEAD, YOU ONLY NEED TO ENSURE THAT EACH RESEARCH GUIDE IS USING THE SIDE-NAV LAYOUT.

STEP 2

In the upper right of your LibGuides, make your status Private.

Setting your publication status to “Private” keeps your patrons from finding this Guide while you work on your site architecture, but it allows you to access it with our Site Previewer.



IMPLEMENTATION

Preliminary Tasks

STEP 3

Add a friendly URL.

Friendly urls turn the gobbledy-gook at the end of a LibGuide URL into a human-readable format. We recommend that all of your pages have friendly URLs.

Testing: Custom Homepage: Home

Testing custom homepage for community libguides templates

Last Updated: Nov 16, 2017 9:31 AM | Type: General Purpose | URL: <https://nclive.libguides.com/c.php?g=701530>

Subjects: [none] | Tags: [none]

The friendly URL may only contain alphanumeric characters, dashes, forward-slashes, and underscores. While uppercase letters are supported, we recommend using lowercase letters to keep things simple.

//nclive.libguides.com/ home

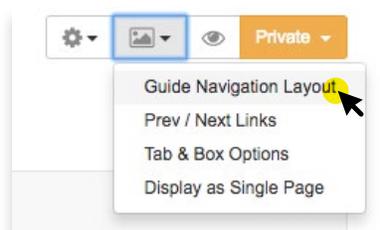
Save Close

STEP 4

Change to the Side-Nav layout.

All guides **except the homepage** should use the Side-Nav Layout.

Your homepage will only have a single page in it, so it will not need navigational elements beyond the new global navigation. Read more about customizing your homepage below.



Select a layout below. If you choose **Clear Selection** your guide will default to using the value set by the system administrator.

Your current layout is being selected by the system default.

Side-Nav Layout

Clear Selection

Tabs Layout

Tab Layout

Side-Nav Layout

Side-Nav Layout

Save Cancel

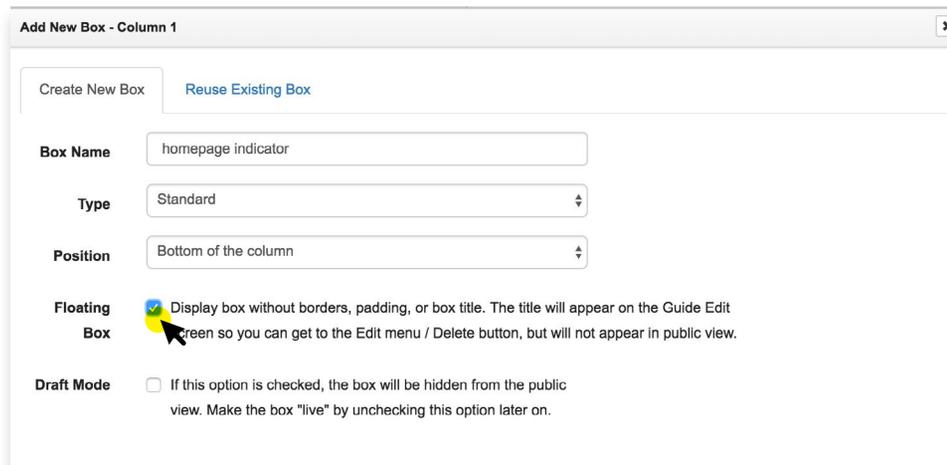
IMPLEMENTATION

Preliminary Tasks

Your new homepage requires some additional setup. Follow these steps to make a hidden content <div> that will let our template know which LibGuide is your homepage.

HOMEPAGE STEP 1

Create a hidden content box. Standard Type, with Floating Box checked.



Add New Box - Column 1

Create New Box | Reuse Existing Box

Box Name homepage indicator

Type Standard

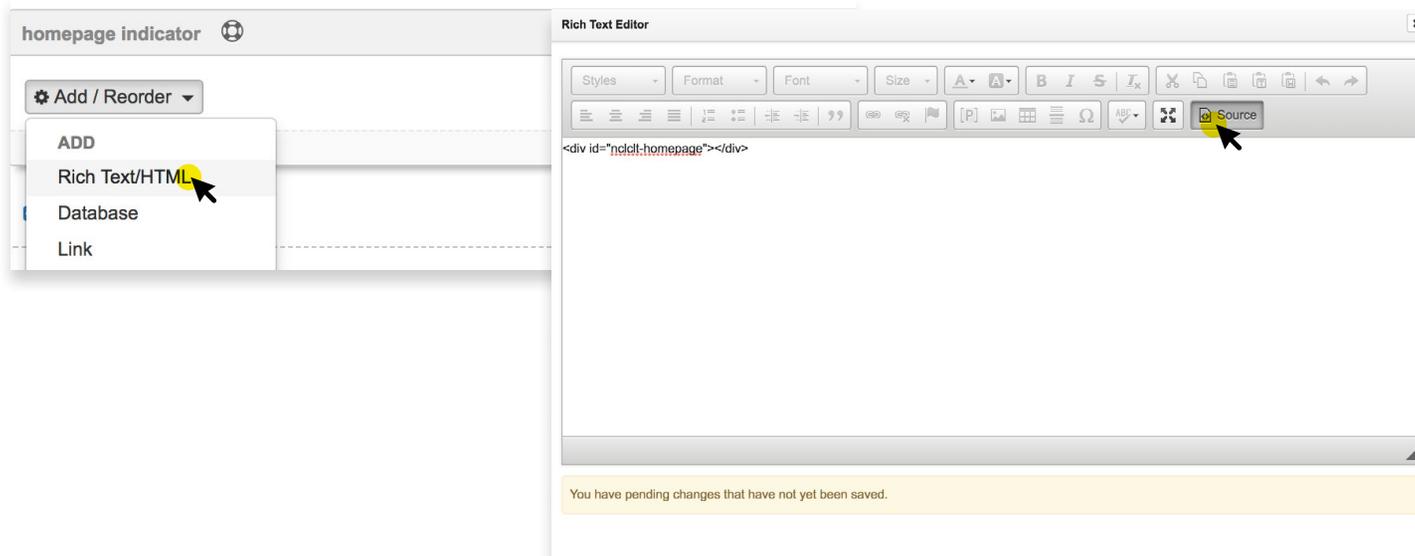
Position Bottom of the column

Floating Box Display box without borders, padding, or box title. The title will appear on the Guide Edit screen so you can get to the Edit menu / Delete button, but will not appear in public view.

Draft Mode If this option is checked, the box will be hidden from the public view. Make the box "live" by unchecking this option later on.

HOMEPAGE STEP 2

Add Rich Text/HTML content. Click Source. And insert the following: <div id="nclclt-homepage"></div>



homepage indicator

Add / Reorder

- ADD
- Rich Text/HTML
- Database
- Link

Rich Text Editor

Styles | Format | Font | Size | A | B | I | S | U | X | [P] | [B] | [U] | [X] | Source

<div id="nclclt-homepage"></div>

You have pending changes that have not yet been saved.



WIDGETS!!!

NC LIVE HAS CREATED A NUMBER OF WIDGETS THAT YOU CAN INCLUDE ON YOUR HOMEPAGE OR OTHER GUIDES. CHECK THEM OUT AT:

[HTTPS://WWW.NCLIVE.ORG/LIBGUIDES-WEBSITE-SERVICE/WIDGETS](https://www.nclive.org/libguides-website-service/widgets)

IMPLEMENTATION

Onboarding

Once you've created your new private site, it's time to create and test your custom template.

In your browser, go to the NC LIVE Website Service Onboarding form:

<https://www.nclive.org/libguides-website-service/onboarding>

STEP 1

Fill out your Onboarding Form and click the Preview Button at the bottom of the page.

STEP 2 *Copy your new Guide url and paste into the preview box. Check the homepage box if this is your homepage, and click "Preview."*



REPEAT

REPEAT STEP 2 ANY NUMBER OF TIMES WITH YOUR NEWLY CREATED GUIDES. UNCHECK THE "HOMEPAGE" BOX IF THE GUIDE IS NOT YOUR HOMEPAGE.

REPORT ANY ISSUES TO THE NC LIVE STAFF.

IMPLEMENTATION

Go Live

Pick a day and time when you expect less website traffic, but when you'll also have staff on-hand to update your site.

You should also consider putting a notification on your current website about the date and time of the change.

Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES

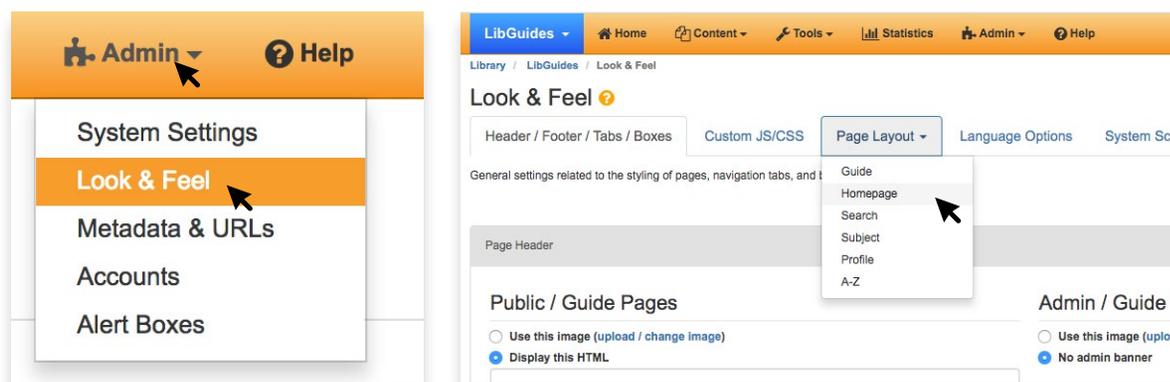
STEP 1

In the upper right of each of your new LibGuides, change the status from “Private” to “Published.”



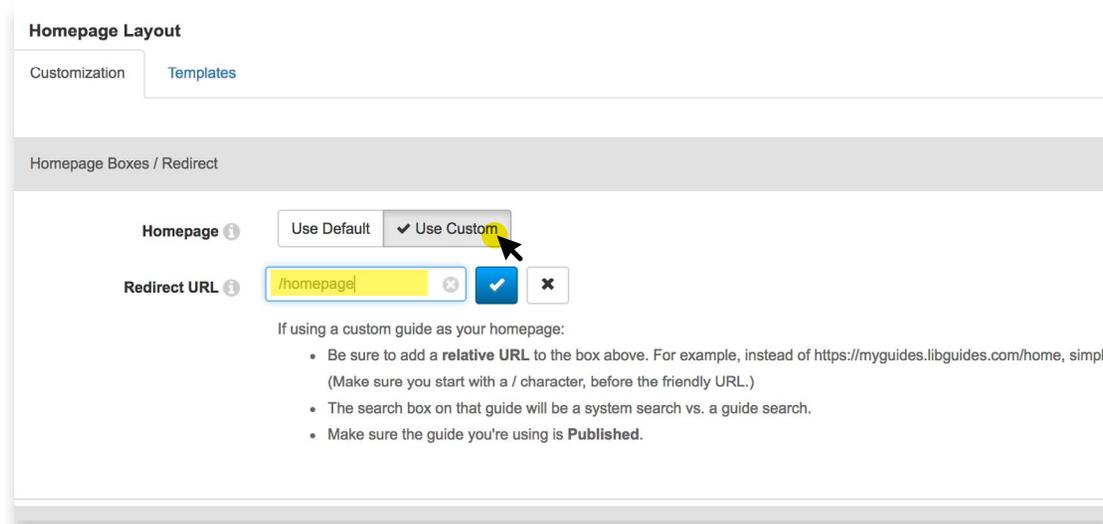
STEP 2

Under Admin in the top menu bar, select Look & Feel. Under Page Layout, select Homepage.



STEP 3

Select Use Custom, and set the Redirect URL to your new homepage's friendly URL in relative form (e.g., /home).



IMPLEMENTATION

Go Live

Your site should now be publicly available, but not have any of the theme applied to it. Load your configuration profile into the onboarding tool and click submit. This will allow you to copy and paste the necessary Header, Footer, and CSS/JS files into LibGuides.

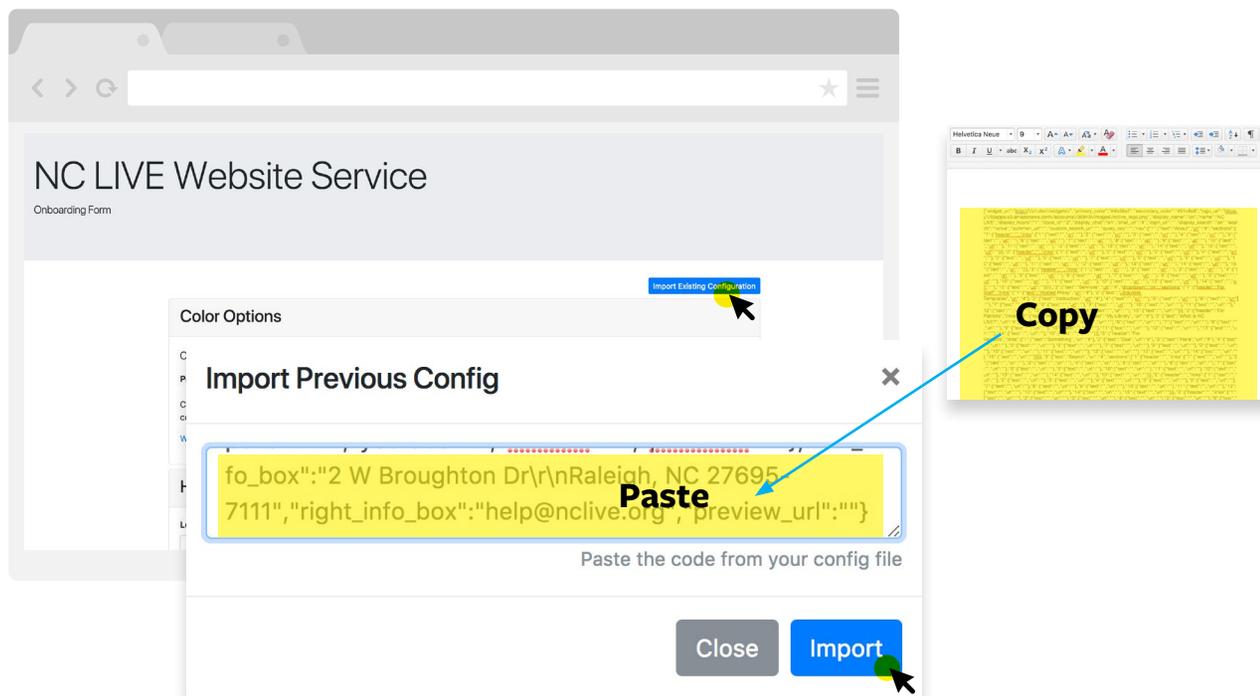
<https://www.nclive.org/libguides-website-service/onboarding>

Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES

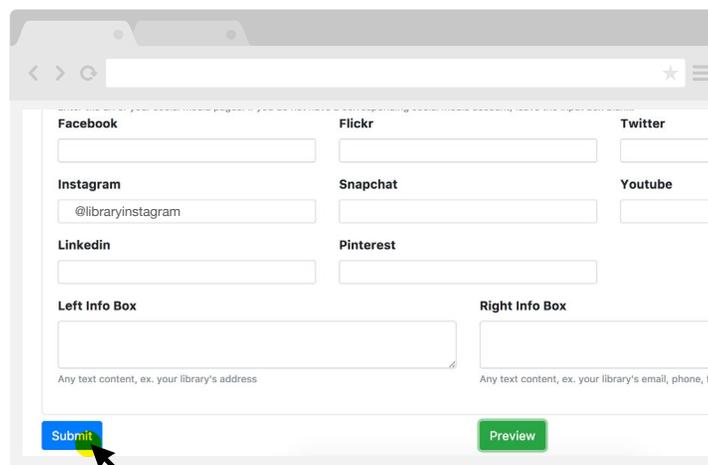
STEP 4

Click on *Import Existing Configuration*, and paste in the configuration that you saved in Step 4 on Page 19. This should populate the form.



STEP 5

Click *“Submit”* at the bottom of the onboarding form.



IMPLEMENTATION

Go Live

The Onboarding Form will present you with four different text boxes: the Header HTML, Footer HTML, CSS / JS, and the configuration options to repopulate the form.

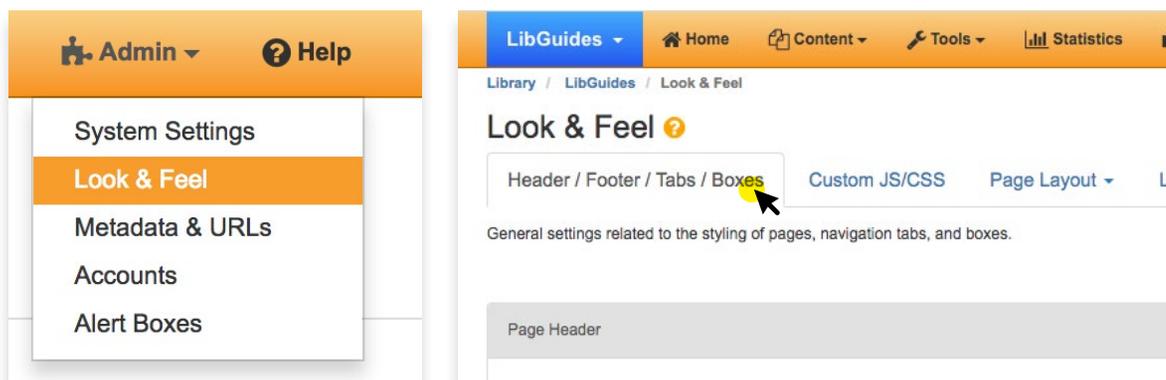
Save your Configuration Profile in a safe place if you made any changes!

Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES

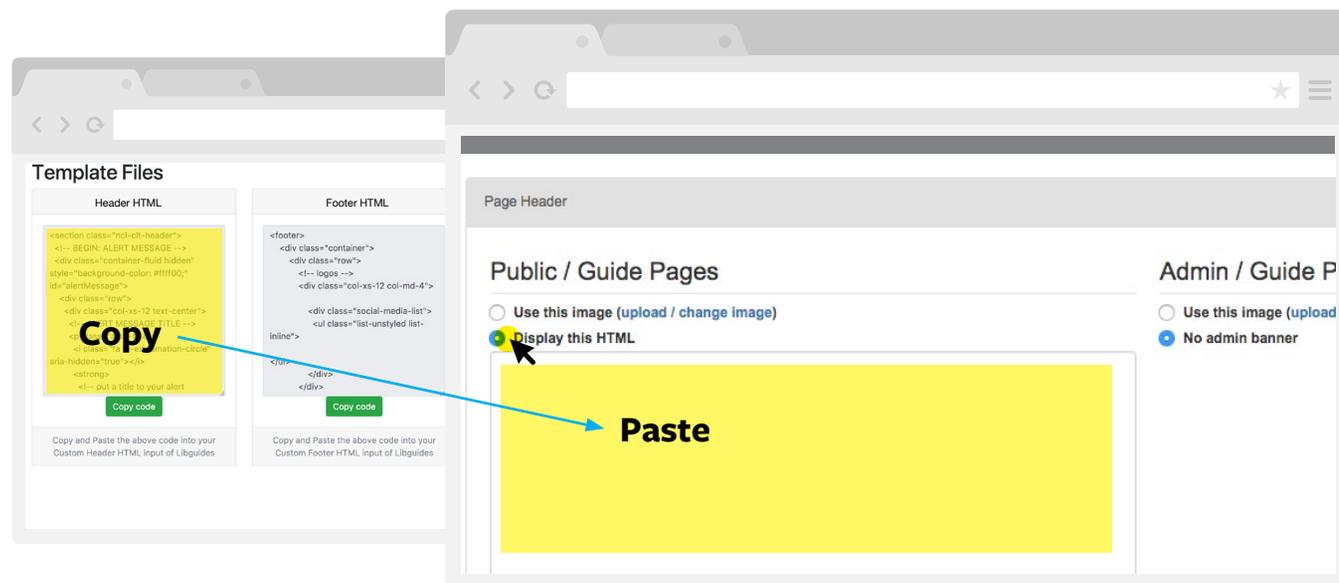
STEP 6

In LibGuides, under Admin in the top menu bar, select Look & Feel again. Make sure you're in the Header/Footer/Tabs/Boxes section.



STEP 7

Copy custom Header HTML text from your Onboarding Form results. Paste into the HTML text box under Page Header and Public/Guide Pages. Ensure that "Display this HTML" is selected. Click Save HTML.

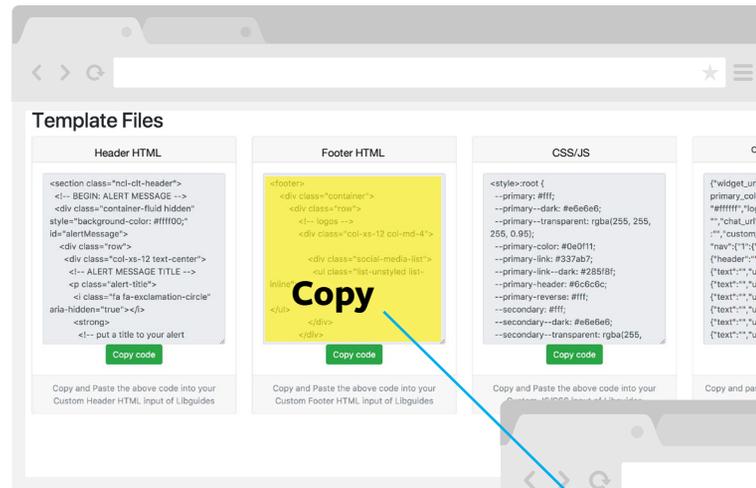


IMPLEMENTATION

Go Live

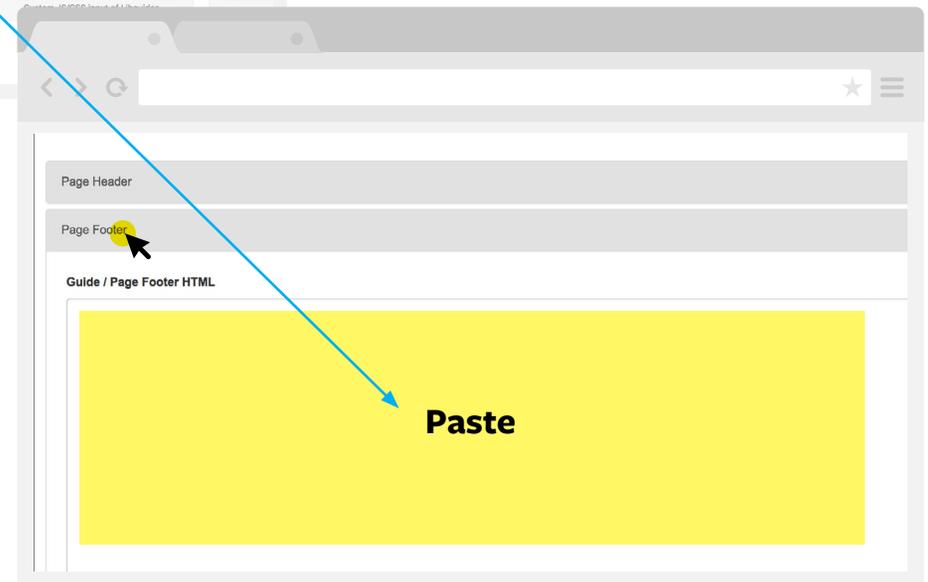
STEP 8

Copy custom Footer HTML text from your Onboarding Form results. Paste into the HTML text box under Page Footer section beneath the Page Header section. Again, click Save HTML.



Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES



IMPLEMENTATION

Go Live

Add your custom CSS/JS from the Onboarding Form to the Custom JS/ CSS box in LibGuides.

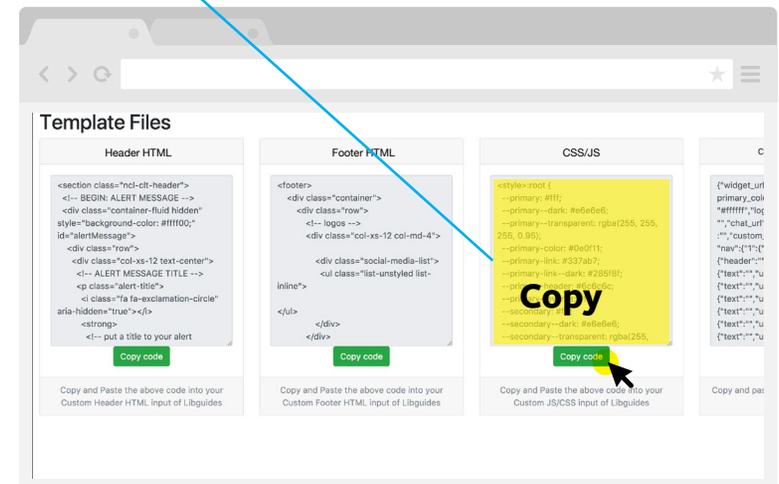
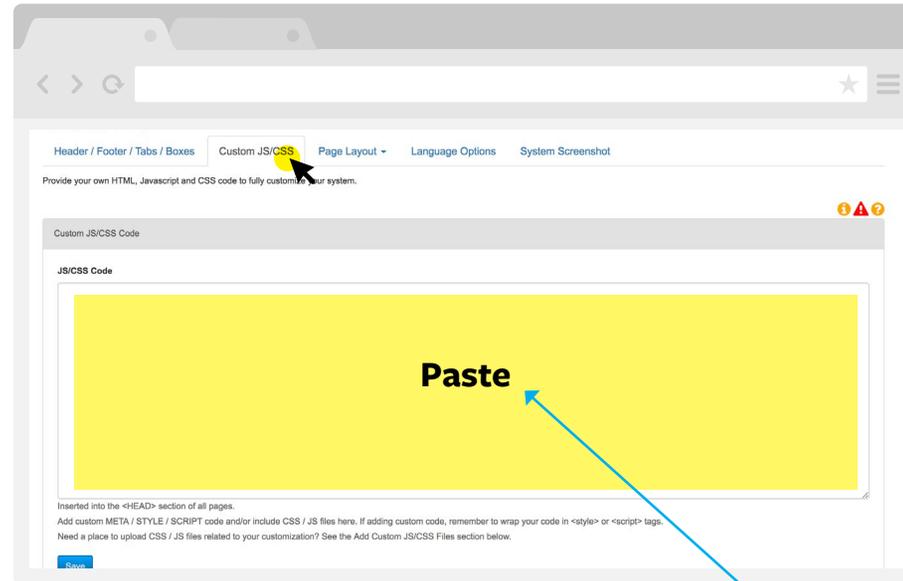
This section has its own tab, so it doesn't follow directly after the footer.

Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES

STEP 9

In your LibGuides window, move from the Header/Footer/Tabs/Boxes section to the Custom JS/CSS section. Copy the custom CSS/JS text from your Onboarding Form results, and paste into the Custom JS/ CSS Code text box. Again, click Save.



IMPLEMENTATION

Go Live

Your new site is live! Now that the design has been applied, it's time to check out the site. Click through your pages and make sure your content is displaying correctly.

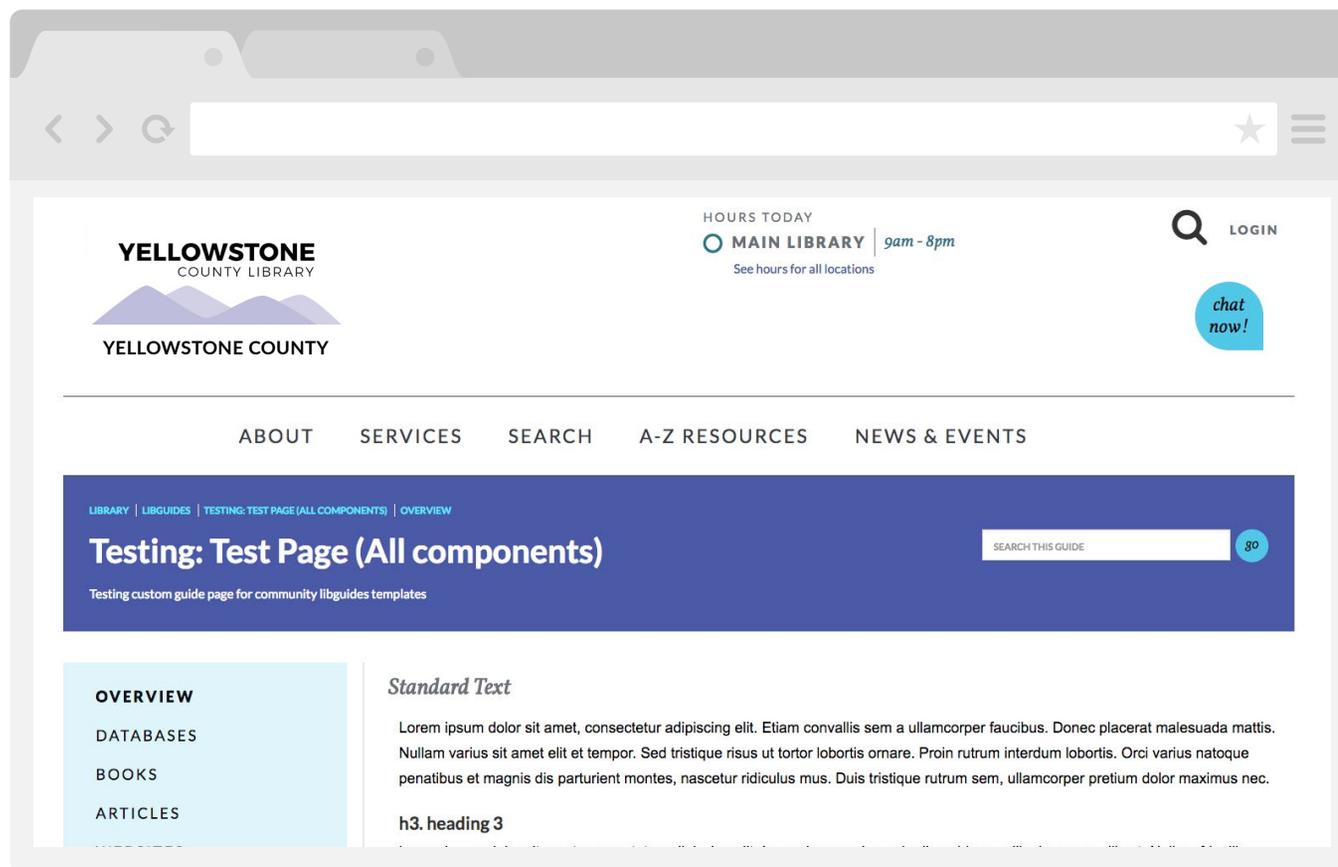
Finally, you'll want to unpublish or delete any of your old LibGuide pages.

Go Live Checklist

- > MAKE ALL PRIVATE PAGES PUBLIC
- > SET YOUR NEW GUIDE HOMEPAGE
- > ADD YOUR CUSTOM HEADER & FOOTER
- > ADD YOUR CUSTOM CSS/JS
- > CHECK FOR ISSUES & ERRORS
- > CLEAN UP OLD, UNUSED PAGES

STEP 10

Check for errors and alert NC LIVE staff to any major issues.



IMPLEMENTATION

Support

CONTACT SPRINGSHARE

If you have a question about using LibGuides in general, check out [Springshare's LibGuides Documentation](#). The State Library of North Carolina also offers tutorials and training at the [Train Station](#).

CONTACT OUR HELP DESK

If something looks out of place, nonfunctional, or otherwise wonky while implementing the website service, feel free to contact the NC LIVE Help Desk at help@nclive.org.



[NCLIVE.ORG/SUPPORT](https://nclive.org/support)



HELP@NCLIVE.ORG



HELP DESK: 919-513-0451