Sitecore Instructions

Log InLog in to Sitecore at [www.loyola.edu/sitecore](http://www.loyola.edu/sitecore) using your standard Loyola username and password.

The first time you log in, click on the “View” tab in the ribbon and check the box for “Entire Tree.” This will add the Media Library to your view.

# Log Out

First, make sure all of your items are unlocked. Click on the “Review” tab in the ribbon, then “My Items.” Select “unlock all.” Click on the “logout” link in the upper right corner to log out.

# Edit a Page

* Navigate to the page in the Sitecore tree
* Click “Lock and Edit”
* Select “Show Editor” to edit the Body Text
* Edit content as necessary. If pasting content from another location, be sure to paste it into Notepad first, and then copy and paste the content from Notepad into Sitecore; this prevents formatting issues. If on a Mac, use TextEdit, making sure to switch to “plain text.”
* If needed, use “heading3” and “heading4” as your sub-head fonts (if your site has been migrated to the new template, use “heading2” and “heading3.”)
* Click “Accept,” “Save,” then “Publish”
* Go to the live site to verify that the changes look correct

# Add an Image

* You MUST resize your photos with [www.picresize.com](http://www.picresize.com) or Photoshop (or another photo editing tool) before uploading into Sitecore. Please see the “Image Resizing” document on instructions on how to do this and recommended image sizes.
* Navigate to your site’s folder in the Media Library. Upload the image(s) in the “images” folder using “Upload Files”
* You MUST add a brief description in the “alt text” field (click on your image in the Media Library, Lock and Edit, and then scroll to the “alt” field to add a description of the image)
* Publish the image(s) and any new media folders you may have created
* Navigate to the page where you want to add the image and open the Body Text editor
* Place your cursor in the Body Text where you want the image to appear
* Select the “Insert Sitecore Media” icon from the toolbar, navigate to the image, and select it
* Once it’s on the page, right-click on the image and go to “properties”
* In the “CSS Class” field, select “image\_right” or “image\_left” to align the image and automatically add the appropriate padding
* **Note**: If you want to change the placement of the image on the page, you can click and drag the image to a new location.

# Add a Document

* Navigate to your site’s folder in the Media Library. Upload your document(s).
* Publish the document(s) and any new media folders you may have created
* Navigate to the page where you want to link the document and open the Body Text editor
* Highlight the text where the link should go (links must be descriptive; DO NOT use the words “click here,” “learn more,” etc.)
* Click on the “Insert Sitecore Link” icon in the toolbar; a new window will appear
* Toggle to the “Media Items” tab and browse the tree to find the document that you uploaded
* Select “Link,” then “Accept,” “Save,” and “Publish”

# Replace a Document

In Sitecore, you simply “swap out” a document for a newer version. This means you do not have to go to the webpage and update all of the links to the document; it will automatically update the links for you. It will also keep your Media Library organized.

* Navigate to the old document in the Media Library and “Lock and Edit” the item
* Select the “detach” link.
* Then, select “attach” to upload the newer version of the document.
* “Save” and “Publish” the document. The newer version of the document will carry through to wherever the document is linked on your site.
* **Note:** Internet browsers sometimes save files in their “cache” to avoid having to download the same file multiple times. If you have followed these instructions and then find that the file has not updated when you go to the webpage and test the link, your browser has probably cached the file. Open the webpage in a different browser from what you normally use and try the link again. You should then be able to see the updated file. Your normal browser will clear its cache automatically in a couple of days.

# Link to Another Sitecore Page (Internal Link)

* Navigate to the page where you want to add the link and open the Body Text editor
* Highlight the text where the link should go (links must be descriptive; DO NOT use the words “click here,” “learn more,” etc.)
* Click on the “Insert Sitecore Link” icon in the toolbar; a new window will appear
* Navigate to the page you want to link to (you can link to any page in Sitecore, including pages you don’t maintain or have permissions to edit, such as the Loyola directions page or another department site)
* Select “Link,” then “Accept,” “Save,” and “Publish”

# Link to a Webpage Outside of Sitecore (External Link)

* Navigate to the page where you want to add the link and open the Body Text editor
* Highlight the text where the link should go (links must be descriptive; DO NOT use the words “click here,” “learn more,” etc.)
* Click on the “Hyperlink Manager” icon in the toolbar; a new window will appear
* Enter the URL (e.g. <http://www.google.com>)
* Select “New Window” in the “Target” field
* Select “OK,” then “Accept,” “Save,” and “Publish”

# Add a New Page

***Page naming guidelines*** – When you create a new page, make sure the page name is all lowercase and use hyphens to break up keywords so that your page can be found in search. There should be no spaces in page names. This makes URLs easier to read and improves SEO (search engine optimization).

* The structure of your pages in Sitecore should mimic the structure of your site’s navigation. In Sitecore, right-click on the page under which your new page should be nested (e.g., if you’re adding a new faculty member’s page, you would right-click on the “faculty” landing page). A fly-out menu will appear.
* Left-click on “Insert >” then left-click on “[department name] Web page”
* Enter the name of the page in the new pop-up window that appears. This will appear in the Sitecore tree and in the URL, so make sure it is short, lowercased, and has NO spaces! Use hyphens to break up keywords, which helps search engines find you. (e.g. student-development)
* Select “OK”
* Edit the name of the page in the “Item Title” field. *This* is what populates the name of the page on the front-end.
* Write a brief page description in the “HTML Meta Description” field. This should be 155 characters or less, describing the page. This is the description that shows up on a search engine results page.
* Enter your “Body Text.” Save and publish. You may then link to the page from another page. If you would like the page added to your navigation, contact the web team via the Web Assistance Form: [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate)

# Quick Links Portlet

* In the Content Editor, expand the “portlets” folder under your homepage item. Click on the quick links portlet.
* Right-click on the portlet and select “Insert,” then “External Link” (even if the link is internal).
* A new dialog window will appear. Enter a short name following proper naming conventions (lowercase, hyphens, no spaces). Enter this name and click OK. The new link will appear in the tree.
* Select the new item that you added.
* Change the “Link Text” field to the text that you want displayed in the portlet.
* Click “Insert Link” above the URL field for an internal link (to another Sitecore page or to a document in your Media Library). If the link is external, click “Insert External Link.”
* After you have specified your link, “Save” and “Publish.” Check the live site to make sure the new link appears.
* To adjust the order of links, right-click on a link, select Sorting, then “Sort before previous” or “Sort after next.” You may need to also publish the “parent” item for the sorting to take effect.

# Open Edit Portlet

* In the Content Editor, expand the “portlets” folder under your homepage item. Click on the appropriate open edit portlet.
* To change the title that appears at the top of the portlet, edit the text in the “Title” field.
* To edit the text within the portlet, use the “Body Text” field.
* Save and publish the portlet and then view the live webpage to verify that your changes look correct.

# Feature Portlet

* In the Content Editor, expand the “portlets” folder under your homepage item; click on the appropriate feature portlet (feature portlets have a blue star icon)
* Expand the “+” sign beside the feature and you’ll see one or multiple sub-items
* Once you click into the sub-item, there are five fields that you can populate. If you don’t populate a field, it simply won’t appear (all fields are optional)
  + Display title
  + Image (if you add an image, it should be 390 pixels wide; height can vary)
  + Body text
  + Link (if you populate this field, it will hyperlink the image, the display title, and the link text)
  + Link text
* If you decide to add another feature to the rotation, you can right-click on the main “feature-portlet” item and insert a new “feature item.”
* To sort the order of the features, right-click on the feature in the tree, select “Sorting,” and sort as needed.

# Twitter Portlet

To add a Twitter feed to your site, request one from the web team via the Web Assistance Form: [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate). You won’t need to worry about editing this portlet since it dynamically populates itself based on your Twitter feed.

# Social Media Icons

To add an icon on your site that links to a social media page (e.g. Facebook, Instagram, Pinterest, etc.), request one through the web team via the Web Assistance Form: [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate). The icon will automatically populate on every page of your site.

We recommend registering your social media page through [www.loyola.edu/socialmedia](http://www.loyola.edu/socialmedia) so it can be listed in the Social Media Directory.

# Tables

Tables should only be used for charting out data and numbers. Paragraphs should never be placed in tables. If you need help setting up or formatting a table, contact the web team via the Web Assistance Form: [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate).

**To add a table to your page:** Click on the “Insert Table” icon in the toolbar. A drop-down will appear. Move your cursor around to indicate how many columns and rows you need (you can always modify it later). When the cells you need are highlighted, left-click and the table will be added to your page.

**To add or delete rows/columns:** Right-click in the table. A fly-out menu will appear where you can insert, delete, or merge rows, columns, or cells.

**To adjust the width of a column:** Right-click in the table and go to “Cell Properties.” Hold down the “Control” key while you select all of the cells in a specified column. Then enter a % in the “width” field, such as 50%. Use percentages (not pixels) so that it translates well to smaller, mobile devices.

**To add a header to the table:** Right-click on the table and go to “Table Properties.” Select the “Accessibility” tab. In the “Heading rows” field, change the “0” to a “1.” This will make the first row of your table have a darker styling which makes the content in that row (your column headers) stand out.

# Anchors

Users should not need to scroll a lot to get to the content they need. If you happen to need a lot of content on one page, however, you can create anchors to help direct people to the information they need. An example of where this makes sense is on an FAQ page. You would have the list of questions at the top and they would link to the answer further down the page.

To create an anchor:

* Place your cursor in front of the first line of text that you want to anchor to
* Select the “Hyperlink Manager” icon in the toolbar. A new dialog box will open; select the tab for “Anchor.”
* Type in the name of the anchor, making sure it’s all one word and lowercase; hit “OK.”
* An anchor icon will appear on the page.

To link to the anchor:

* Scroll to the top of the page where you’ve typed the text that you want to link to the anchor; highlight the text.
* Select “Hyperlink Manager” again (don’t toggle to the anchor tab); select the name of the anchor in the “Existing Anchor” drop-down.

# Troubleshooting

* ***I can’t single-space my text*** – Hold down the “shift” key as you hit enter and your cursor will drop down to the next line instead of double spacing.
* ***My image is not displaying and is showing up as a red ‘x’*** – Make sure the image is published in the Media Library.
* ***My document link isn’t working*** – Make sure the document is published in the Media Library (make sure that that the folder it is in is published also).
* ***The links in my bulleted list are running together and linking the bullet itself*** – Add two spaces after each bullet of text, highlight the text only (not the two additional spaces at the end), and then create the hyperlink. Since there are unlinked spaces at the end, it won’t allow the link to carry down to the next bullet of text.
* ***My text doesn’t look like it’s formatted correctly*** – Copy all content into Notepad before pasting it into Sitecore.
* ***My external link is not working*** – Make sure the link has “http://” at the beginning.
* ***My Sitecore form is incorrect or needs a revision*** – contact the web team via the Web Assistance Form: [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate)

# What to Contact the Web Team For:

* Deleting, unpublishing, or archiving unused pages
* Unlocking a page
* Changes to the navigation
* Edits to forms created in Sitecore
* Add or remove portlets in the right column or on the homepage
* Add social media icons
* Add or change a “banner” image on your site
* Advice regarding anything on your site
* Sitecore help or troubleshooting

Members of the web team are here to provide advice regarding anything on your site or assist with any issues you may have. Submit your request at [www.loyola.edu/marcomm/webupdate](http://www.loyola.edu/marcomm/webupdate) or visit the Content Owners Network website for tips on best web practices, SEO, accessibility, and more: [www.loyola.edu/con](http://www.loyola.edu/con).