Getting set up in Sitefinity

Before you can begin working in Sitefinity, you will need to request your default site from the administrators. To do this, you will need to answer some questions about who will be working on your website, and what default settings you wish your website to have.

Defining Roles in Sitefinity

**Who is the content author, designer, developer, editor and owner for the site?**

Roles are an important part of our implementation of Sitefinity and the Web Reboot. Roles help us appropriately set permissions, determine what tools and capabilities are available to an individual, and help system administrators know who to contact with site management or other questions.

Roles are associated with individual sites, and a single person may fill multiple roles, depending on their skill sets and/or the requirements of an area.

**Content author:** The content author is in charge of the day-to-day edits the site needs to stay fresh. This is the primary and most common level of access. Every site needs someone designated as a content author.

**Designer:** The designer is the person who will be responsible for implementing the layout, optimizing design, setting up navigation/page structure and often entering the first draft of content to the site. This person should be familiar with basic HTML, CSS, and JavaScript. This is the person who will be moving (copying and pasting) the text and images from an old site into the new site, and working on the layout in Sitefinity. Every site will have a designer; the designer may be the same person who serves as a content author; she or he may also be in another department or be contracted through Information Services.

**Developer:** In our use of Sitefinity, a developer is an advanced role, a programmer function for someone who will be developing, testing and implementing code, and building special custom applications for sites. This is an optional role; we anticipate the built-in capabilities and templates of the CMS will meet or exceed the needs of most users and applications.

**Editor:** We plan to enable site builders to create workflows that will route page updates and changes to editors for approval. An editor can be a manager, colleague, the site owner or anyone designated by a department. *The workflow process is optional and is not required; it has not yet been enabled in the system.*

**Owner:** The person in the area requesting and/or ultimately responsible for the site. A site owner may be a program director, departmental chair, area manager, VP, etc. She/he may or may not have any hands-on management of the pages in a site. Avoid “going to the top” of your organizational chart unless that makes most sense for your web site; the owner of a site will be sent key notices and reminders about the site.

For each of these roles, you’ll need a person’s name, department/area and email address.

Gathering and Finalizing Content

- Review and organize content
  - Text and images should be arranged by page. The content should be approved and edited before work begins online
  - Gather all of your images and files together before you begin
- Site structure
  - The pages in your website make up the navigation, make these decisions before beginning the work online
  - Know the layout you wish to have before you begin
- Any bells and whistles?
Will you need a blog, a special map, news and events, an image gallery? Have these discussions before work begins online

Site Appearance

Discuss the Site Settings with the designers, editors and site owners to choose template options. These are the basic decisions to help the administrator determine the initial settings of your site. Many of these decisions can be changed at a later date if you decide you wish to have something different. When you register your site, you’ll be asked key questions--essential information including site name and URL, and whether the site is internal or public.

**Desired URL:**

Public sites typically use “www.utmb.edu/sitename” urls; intranet sites use the “intranet.utmb.edu/sitename” standard. Subdomains such as “som.utmb.edu” are reserved for special applications and must be approved on a case-by-case basis.

**Site Title:**

Site and page titles are part of your meta data and play an important role in search.

**Header Title:**

**Header Subtitle:**

The default for the subtitle field is “The University of Texas Medical Branch,” but you can customize this field to something more meaningful for your site.

What type of header do you want for your site?

**Dark Header Example:**
Light Header Example:

You may want to check with your entity representative on the ITC, as some institutional areas have settled on a specific look for all their sites.

Navigation Types

Institutional Navigation:

In addition to UTMB’s main institutional navigation, custom navs have been created for academic areas (Provost) and for patient care. Check with your entity representative on the ITC to see if there is a preferred navigation option for your area. You also have the option to not use an institutional navigation, which for some sites is an appropriate choice. However, keep your users’ needs in mind if opting to leave this navigation option off.

Navigation Menus: (Site Specific)

Side-Nav Left This is one of the more common/standard navigation approaches, and is always a good choice.

Side-Nav Right If you have dynamic or important content you want to highlight in the left-hand content area, you have an option to move the menu to the right.
Main Nav
The following options all present subtle variations on the same theme. All three examples are using an institutional navigation; they can be used without this navigation.

Top Bar Nav
Working on your Sitefinity Site

With this information and decisions in hand, fill out the online form at [http://intranet.utmb.edu/web/policy/site-registration](http://intranet.utmb.edu/web/policy/site-registration). Information Services (EIS) will then contact you when the site has been created in the staging environment. You will receive a link to your site and you will be able to log-in (using your standard UTMB username and password) to begin working on your site.

Review the training videos specific to our use of Sitefinity at UTMB: [http://intranet.utmb.edu/web/design/utmb-sitefinity/videos](http://intranet.utmb.edu/web/design/utmb-sitefinity/videos)

When the website is completed and is ready to be made live for the world to see, a request must be sent to EIS (replying to their response above) informing them of the need to move your site into production. Once the site is out of staging (the development area) and in production, future editing and updates will all be done in your production (the live) environment.

Helpful links:

- Web Resources site: [http://intranet.utmb.edu/web](http://intranet.utmb.edu/web)
- Sitefinity Registration and Setup Requests: [http://intranet.utmb.edu/web/policy/site-registration](http://intranet.utmb.edu/web/policy/site-registration)
- Web Style guide: [http://intranet.utmb.edu/web/design/style-guide](http://intranet.utmb.edu/web/design/style-guide)
- Everything Sitefinity: [http://intranet.utmb.edu/web/design/utmb-sitefinity/overview](http://intranet.utmb.edu/web/design/utmb-sitefinity/overview)