WEBSITE TRAINING GUIDE

bci.ca

Table of Contents

BCI Website Guide 3

- What You Most Need to Know About WordPress 3
- Logging in to the site 3
- Content Editing 3
- Editing Content - Save Draft of Published Content 4
- Editing Content - Triplet Teasers Section & Database 7
- Editing Page Content – Home Page 9
  - Image Slider Section 10
  - Full Width Bar Section 12
  - Icon Section 13
  - Media Slider Section 14
- Editing Page Content – Internal Pages (not home page) 15
  - Banner Section 15
  - Two Column Text Section 15
  - Three Column Text 18
  - Investment Profile 18
  - Content With Sidebar Section 19
  - CTA Section (Call To Action) 20
  - Accordions 20
  - Fact Sheets 20
  - Grid 21
  - Principles 22
  - Portfolio 23
- Shortcode 24
- Moving Icons, Slides, and Sections 25
- The WYSIWIG Editor 25
- Yoast SEO 26
- Document Libraries (Publication Archives & Submissions and Comments) 29
- Document Posts (Adding a new document) 30
- Document Posts (Editing an existing document) 30
- Adding/Editing Bios 31
- Contact Forms 32
  - Accessing Contact Form Submissions 32
- Media Library 33
- Class legend 35
- Resources 36

BCI Website Guide

What You Most Need to Know About WordPress

WordPress is an open source content management system. As such, it is continually being updated to meet modern demands. Please refer to the **official documentation** for more general instructions. Below we will walk through more detailed instructions on how to edit the specific content sections on each page.

Logging in to the site

To log into the site and start editing, go to **https://www.bci.ca/wp-admin** and enter your username and password. Once you are logged in, you will see a black toolbar at the top of the page and will be on the Admin Dashboard. Depending on your role you'll have different Admin Panels available a general overview of them is available here;

https://codex.wordpress.org/Administration_Panels

Content Editing

WordPress standardly supports Media, Pages and Posts for content types, and we've extended this through Custom Post Types to include content types for Bios and the Document Libraries.

Aside from the standard editor provided by WordPress we've supplemented this functionality with custom fields for the specific coding of the BCI website. Below are extensive overviews for Writing Posts and Pages;

Posts - **https://codex.wordpress.org/Posts**

Pages - **https://codex.wordpress.org/Pages**

Post Status - **https://codex.wordpress.org/Post_Status**

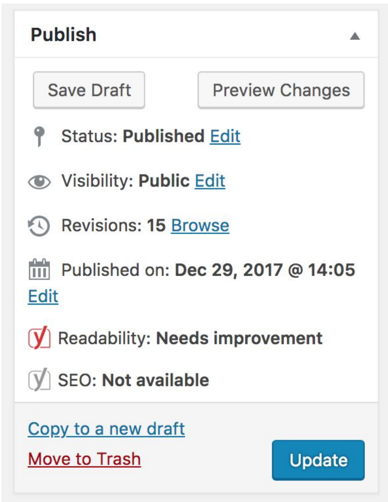
Duplicate Posts - **https://duplicate-post.lopo.it/docs/general/usage/**

*Note: To allow drafts on published content we've supplemented the default workflow with the ability to save a draft duplicate of the content, edit/preview and upon publish have it replace the original content.

The BCI WordPress site comes complete with a number of pre-designed sections for you to use, as described on the following pages.

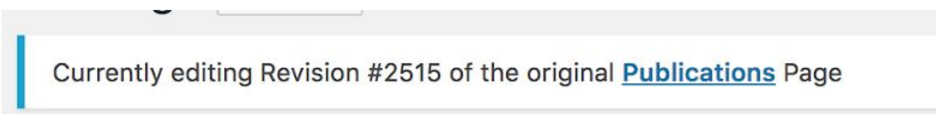
Editing Content - Save Draft of Published Content

When editing a Published Page/Bio/Post the Publish metabox will now have a 'Save Draft' button;

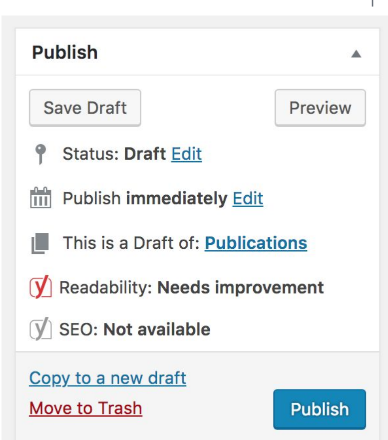


Clicking on 'Save Draft' will create a duplicate of the current content including any content being edited. Once this process is complete the user is presented with the draft so they can preview/edit/trash/publish normally. Publishing a draft will replace the original and to avoid content reversion all other drafts will be moved to the Trash. The same goes if the original is updated then all other drafts will be moved to the Trash.

When viewing a draft it will indicate via an alert that you're editing a draft and for which original content;

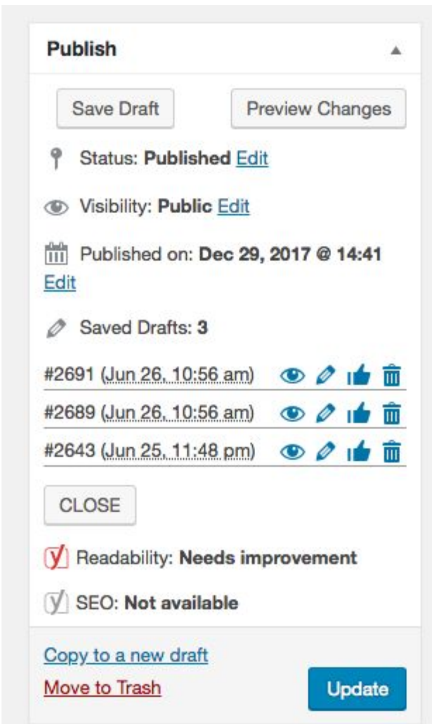


This information will also be present in the Publish metabox;



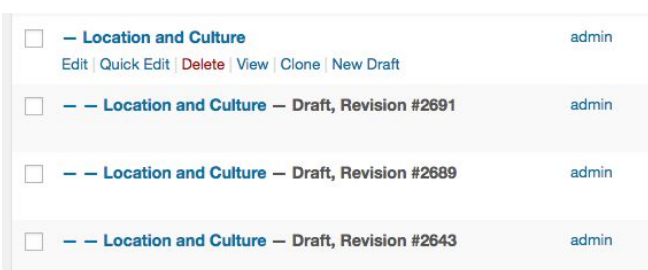
When viewing the original it will indicate via an alert that variations exist for the content;

The available drafts will be found in the Publish metabox, clicking 'List' will expand the list to show all available drafts and their actions (Preview, Edit, Publish, Trash);



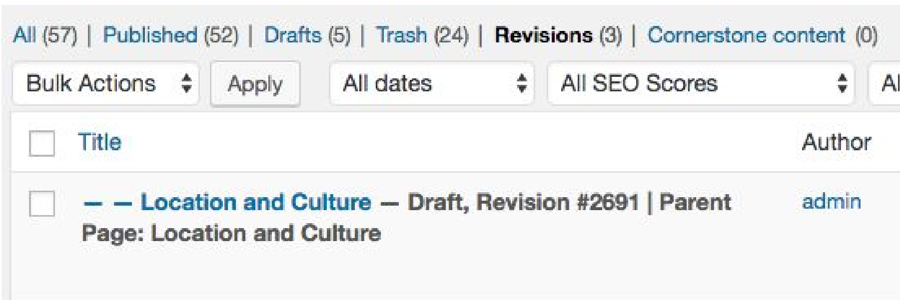
*Note: Depending on the users capabilities these actions may not all be available to their role.

From the Pages/Bios/Posts list the drafts will be denoted as 'Revision #####' using a unique number for easy reference.



Note: On hierarchical post types (pages) the drafts will be inset below the original page, non-hierarchical post types (posts/bios) don't support this.

We've also introduced a 'Revisions' filter view when drafts are available, selecting will filter the list to all available drafts;

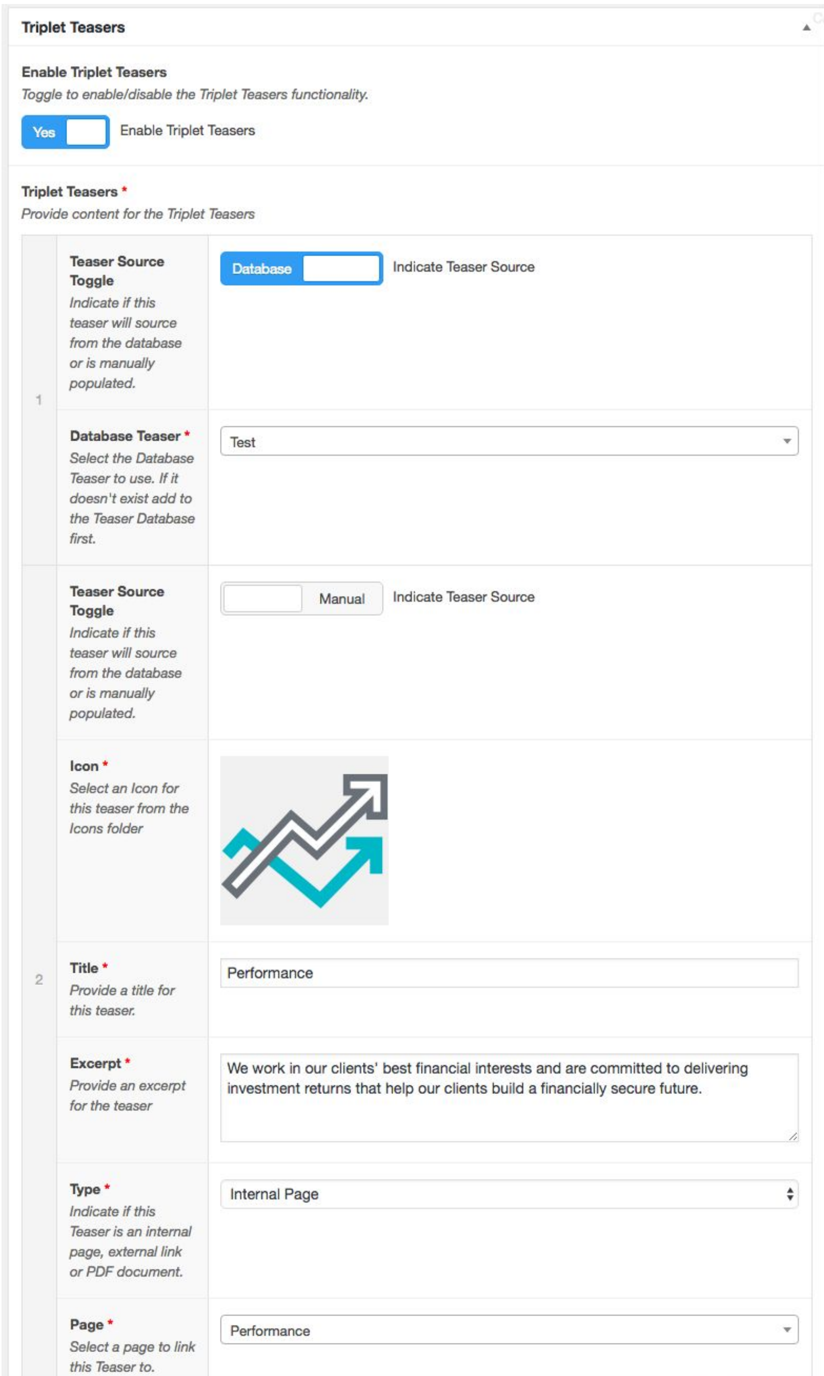


WARNING: To avoid content reversion we move drafts into the trash when the original post is updated. These posts can be restored but should only be published if you're absolutely certain they contain all updated content.

LIMITATION: Due to the Teaser Database and Document Libraries not being public posts with the ability to preview they've been excluded from this functionality. For Document Libraries it's best to duplicate the library, edit and then publish, grab it's ID and in a draft of the original page place the updated shortcode to be able to preview. For Teasers it's best to duplicate the teaser, edit and then publish, then in the source page create a draft with the above functionality and select the new teaser for previewing.

Editing Content - Triplet Teasers Section & Database

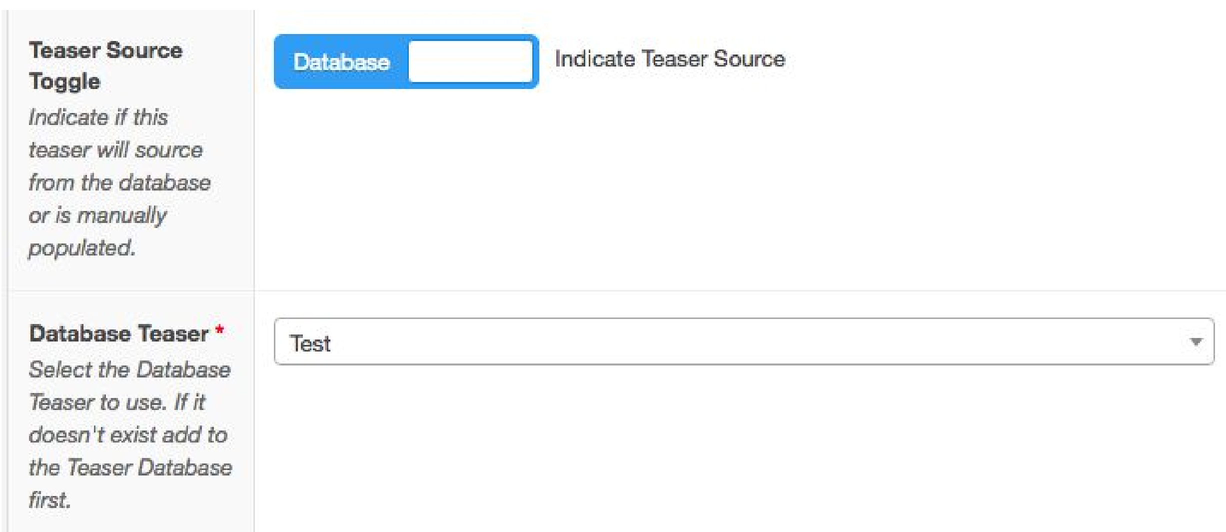
The Triplet Teasers Section has been supplemented with a Teaser Database allowing for the creation and re-use of individual teasers across multiple pages. Each triplet teaser has the ability to be manually entered or sourced from the Teaser Database so as to keep existing teasers and support one-off teasers. This is controlled by a toggle as follows;



Aside from the new 'Teaser Source Toggle' introduced in the Triplet Teasers section all fields match those found on individual Teasers in the database. Those fields are;

- **Icons** – icons are the same as images, just smaller with a circle applied to them: 160 pixels wide by 160 pixels tall.
- **Title** – this is the title of the teaser.
- **Excerpt** – this is the text of the teaser.
- **Type** – this option allows you to set the triplet teaser as an internal page, URL to a different page, or PDF document.
    - When set as an Internal Page – simply choose the page on the site where you would like the teaser to link to.
    - When set as URL link, you will also need to set up:
        - **Link** – where you would like the teaser to link to.
        - **Thumbnail** – choose the thumbnail image that you would like to see within the teaser.
    - When set as PDF document :
        - **PDF** – choose the PDF that you would like to link this teaser to.
        - **Thumbnail** – choose the thumbnail image that you would like to see within the teaser.

The new 'Teaser Source Toggle' when set to Database provides a 'Database Teaser' selector for choosing Teasers from the database, it appears as follows;



Editing Page Content – Home Page

In the menu, click “Pages.” This will show you a list of all the pages on your website.

Find the name of the page you’d like to edit, and then click on the title or the “Edit” link that appears when you hover over the item. To edit the home page, find the item: “BCI – Front Page” and click it.

Eclipse 360 has built the WordPress back-end of the BCI site to be as intuitive and user-friendly as possible by breaking up the content into what we call sections. Each section has different styling rules for 3 different breakpoints: desktop, tablet, and phone sizes. Most of the styling rules have been pulled into the global CSS, or Cascading Style Sheets for two important reasons: 1) consistency of application across the site, and 2) we didn’t want to muddy the content with a bunch of styling rules.

Even though we’ve done our best, sometimes CSS rules will have to be applied within the content in order to do something unique or special on particular pages; we’ll do our best in this guide to identify those cases.

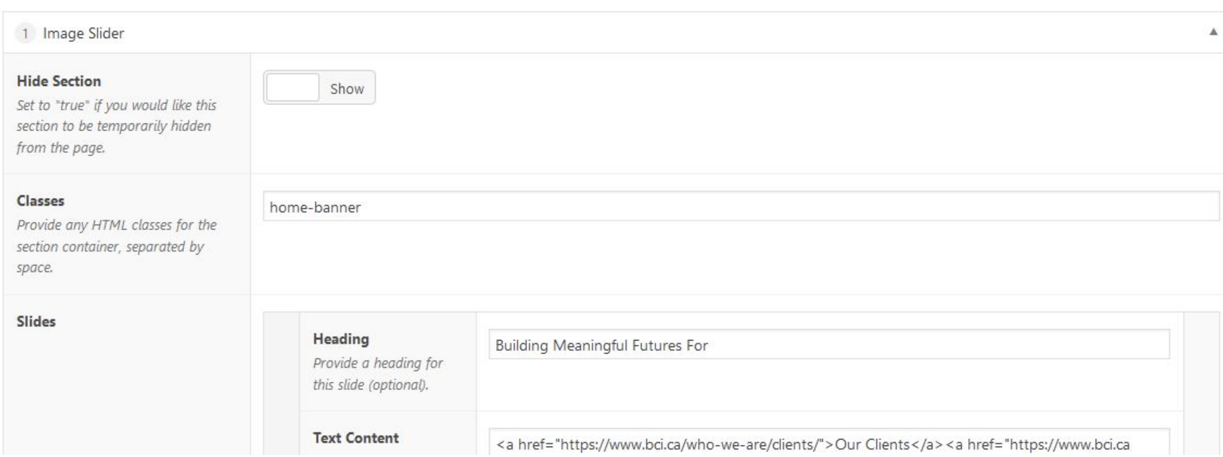
So, now that we have the home page open, notice the following sections:

- Image Slider
- Full Width Bar
- Icons
- Media Slider

Image Slider Section

An image slider is a full-width section that allows you to place a banner sized image and text within slides that will rotate at a pre-defined interval. If the image slider (or any section) is collapsed into just the header:

simply click on the bar and it will expand to show you all of the options available for that section:



With the image slider section expanded, you should see fields like:

Hide Section toggle button – this will hide the entire image slider if you don't want it to be shown right now, but you need it in the future.

Classes field – these are special CSS classes that can be applied to sections, in this case, we've designated this image slider as the "home-banner". Please refer to the class legend at the bottom of this document for specific layouts.

Slides – this is a repeating section that allows you to add one or more slides to it. Each slide has the following fields:

- **Heading** – this is the heading text that will appear on the slide; if you look at the home page this is the text that reads "Building Meaningful Futures For".
- **Text Content** – this is the text that will appear underneath the heading in a slightly smaller font. For the home page you'll notice that we included HTML text links to other pages that looks like this:
  Our Clients
  Our Investments
  Our People
  This will produce 3 text links in the content section broken down as <a (anchor) href="URL" (URL that you would like the text to link to), Our Clients (text that the user clicks on to go to that URL, (close anchor tag).
- **Image** – this is the background image for this slide. If you're making new banners, please make them at least 1920 pixels wide by 550 pixels tall. Ideally, images should be 3840 pixels wide by 1100 pixels tall for high resolution displays.

To change an existing image, simply move your mouse over the image until you see a pencil (edit image) and x (remove image). Click the X to remove the existing image and then click on the Add Image button; this will pull up the media library where you may select an existing banner image, or drag and drop a new image from your desktop onto the media library (wait a few seconds for the image to upload to the server) and then click the blue Select button in the bottom-right of the screen.

Once you have an image selected, WordPress will show you a thumbnail of the current banner image.

- **Add Slide button** – click this button to add a new slide and add in the various content pieces for it as described above.

Moving slides around is a snap, notice that each slide has a number in grey to the left of each slide, simply click and drag the slides into the order that you would like them to appear on the site and click the blue Update button in the upper-right of the page to save your work.

Full Width Bar Section

A full width bar section is simply a block of text with a background colour applied to it.

Expand this section and you should see:

Hide Section toggle button – this will hide the entire full width bar if you don't want it to be shown right now, but you need it in the future.

Classes field – these are special CSS classes that can be applied to sections, in this case, we've designated this image slider as the "intro" and "top". The "intro" class sets the text colour, boldness level, and padding on the left/right top/bottom of the block of text.

Background colour – allows you to set the colour that will appear behind the block of text.

Heading – this is the text that will appear centred and larger than the section text.

Content – this is the text that will appear within this section.

Enable Button toggle – enabling a button places a button at the bottom of the text block.

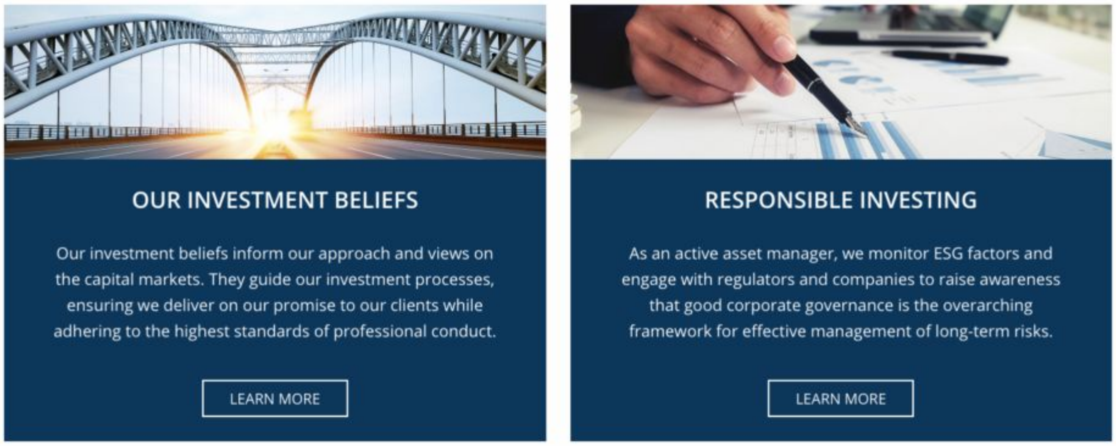
Button Label – this is the text that will sit on top of the button.

Button HREF – this is where the user will go when they click on that button. Please ensure that the URL has either 'http://' or 'https://' in front of it otherwise WordPress will assume that the link is on your site somewhere.

Button Class field – this field allows you to add custom classes to the button itself.

Icon Section

An icon section contains things like background image/colour, heading, intro content, and, of course, a section for icons to appear.



Expand this section and you should see:

Hide Section toggle button – this will hide the entire icon section if you don't want it to be shown right now, but you need it in the future.

Heading – this is the text that will appear centred and larger than the intro content text.

Intro Content – this is the text that will appear within this section.

Icons Per Row – this is the number of icons you would like to see within each horizontal row.

Icon Items – this is a repeating section that allows you to set up the icon items with things like:

- **Enable Link** – this allows you to set up the icon with a link, that will take you to a URL on, or outside of, your site.
- **Link** – this is the URL of where you would like this icon to go to when clicked.
- **Image** – this is the background image that you would like behind your icon. If you're building these on your own please make background images 1328 pixels wide by 380 pixels tall.
- **Label** – this is the text that will appear as the title.
- **Content** – this is the text that will appear inside the body of the icon item.
- **Enable Button toggle** – this allows you to set up a button within the icon item.

- **Button Label** – this is the text that will appear inside the button.
- **Button Class** – this is the URL for the button.

Over on the right-hand side of the icon row, you'll see +/- buttons that allow you to insert or remove icon items. To add an icon to the end of the icon list, simply click the blue, Add Icon button and a new section will appear and prompt you for some more information as described above.

Icons can be dragged and dropped into whatever order you prefer by clicking on the grey numbers to the left of the icon item and moving them around. Don't forget to save your work using the blue Update button in the upper-right of the screen.

Media Slider Section

Media slider sections are blocks of text within a slider element. I'll describe the new fields found in this section:

Slides repeater – similar to the Image Slider, these are slides, but you will see more than one at a time.

- **Link / File Path** – this is where the user will go if they click on one of the media items. Each link / file path selected will have a title which is set from the page that you choose, this is done for consistency sake, so if you were to change the title of a page, any link / file paths would also change automatically.
- **Text Content** – this is the text of the body of the media item.

Slides can be moved, inserted, and deleted just as described in sections above.

Button – this is the button that will appear below the media items.

Editing Page Content – Internal Pages (not home page)

Internal pages of content are similar to the home page, with some subtle differences as described below. If you click on Pages from the menu, choose Who We Are to see the following sections:

Banner Section

Banners are almost identical to Image Sliders, just with fewer fields as there aren't multiple slides to set up.

Background Image – choose an image or drag and drop one from your desktop to use as the background image of the banner. Please build as 3840 pixels wide by 1100 pixels tall.

Background colour – optionally, you can use a solid colour instead of an image by choosing a colour from the colour picker here.

Heading – this is the text that will appear, centred within the banner area.

Two Column Text Section

Two column sections are blocks of text and/or images that appear side by side.

First, you may optionally set some things for the entire two column text section such as classes, and intro content that will appear centred above the two columns.

Classes – Used to generate specific layouts for different types of content. Please refer to the class legend at the bottom of this document for details.

Intro Content / After Content – Full width text that precedes or follows the 2 column layout. Some fields within this section are only used conditionally based on which class is being applied to the section.

Column 1/2 Heading – this is the text that will appear at the top of the left or right section.

Column 1/2 Subtitle – this is the text that will appear below the heading in a slightly smaller font size.

Column 1/2 Content – this is the text that will appear in the body of the left or right columns.

It's important to note that we added the ability to put HTML markup within the content fields for the columns for specific customization purposes:

- The <h2></h2> tags will set the text in a larger font size.
- The anchor tag allows you to create a button to another page on the site.
- The image tag - simply include the URL to an image in the media library (you can find the URL by selecting the image in the media library and copying the URL in the upper-right of the properties box), set the width as 550 pixels and the height as auto. If you don't set the height as auto, the image will skew and stretch to fit the sizes you specify.

Column 1/2 Footnote – this is text that will appear in smaller font below the column text or image.

Column 1/2 Enable Link – this will allow you to set up a button in the left or right column. Once enable you will be asked to choose a link.

Column 1/2 Buttons – one or more buttons can appear within the left or right sections by clicking Add Button and then choosing the link and title for the button.

A Note on Infographics
Within some of the two column text sections, you'll notice that there are some infographics; in order to set these up correctly, please add "content-infographic" to the classes field and optionally "bottom-border" as seen on the Our Clients page.

This will set up the infographic so that it will float correctly on mobile platforms.

Please note that within the column that you would like the infographic to appear in, we had to set up inline style rules for subtitle and footnote content as follows:

```
<div style="margin-top: -60px;"></div>
<h3>CLIENT PROFILE</h3>
<small style="font-size: 85% !important;">As at March 31, 2017<sup>1</sup></small>

<img class="size-full wp-image-1175 imgcenter"
src="https://www.bci.ca/wp-content/uploads/2018/01/whoweare_4clientgroups_percentage_79
0.png" alt="" width="500px" height="auto" />
<small><sup>1</sup> Percentages based on net assets</small>
```

When looking at the Our Clients page, you'll see that the H3 style is the midnight blue text in all caps above the graphic. The <small style> is the subtitle text and is a superscript tag. The infographic itself is just an image from the media library and the <small> tag is the footnote content.

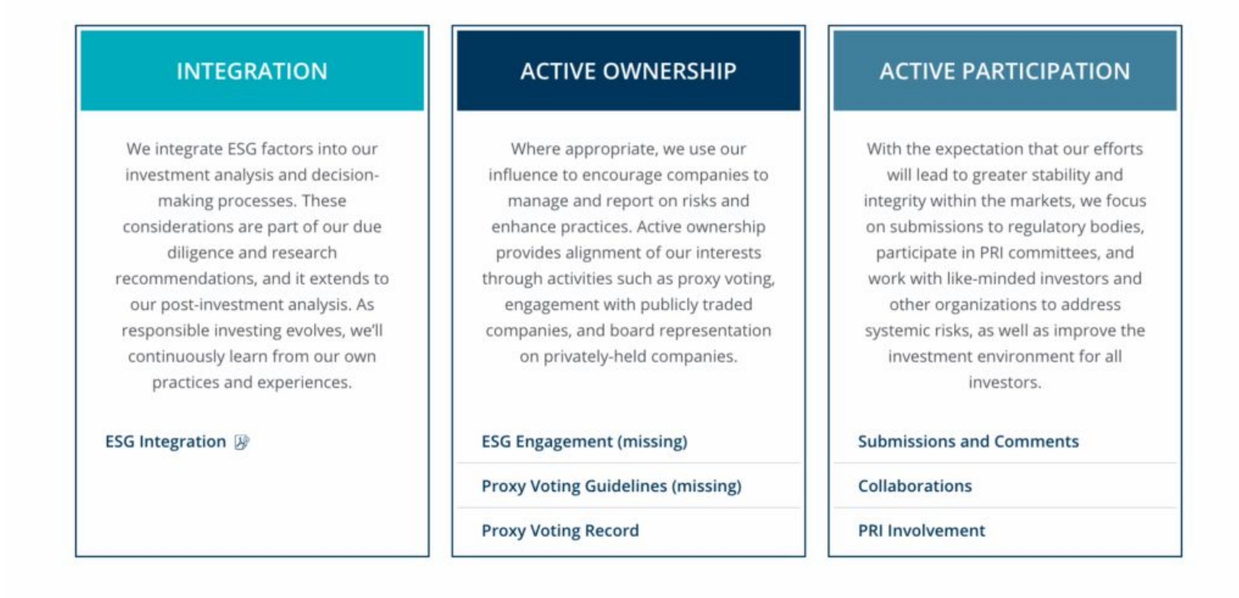
A Note On Adding/Removing Sections

When a section is expanded, you'll notice that are two new icons on the far right; one with a plus sign (add a section here) and a minus sign (remove this section). The plus button allows you to insert a section above the current section. The minus button removes the current section but it does prompt you, and the up/down arrow allows you to collapse/expand the section.

If you would like to add a section to any page, simply scroll down to bottom of the page and press the blue, Add Section button; WordPress will display all of the types of sections that we've created specifically for BCI.

Three Column Text

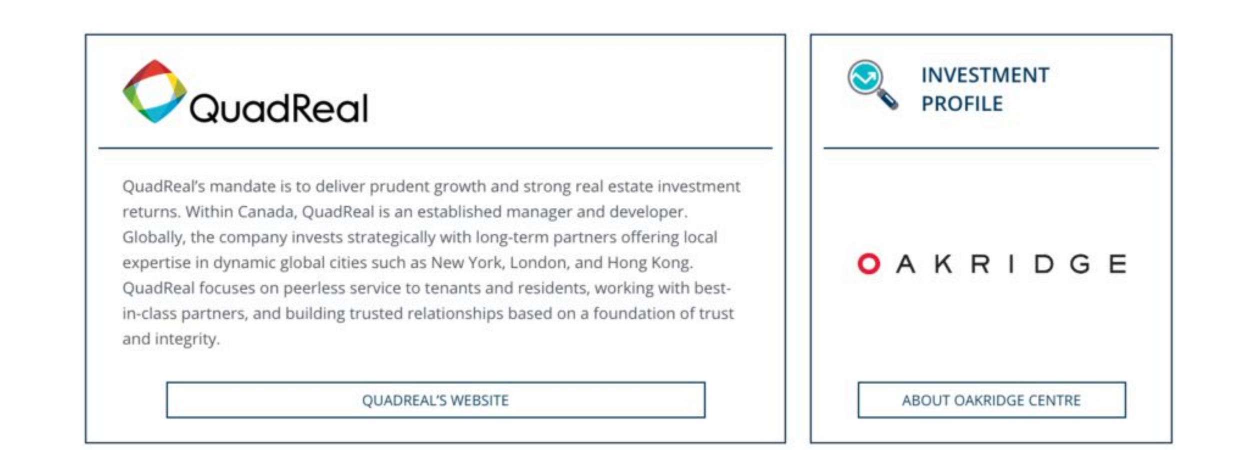
This section is only used on the **https://www.bci.ca/approach/responsible-investing/** page. Shown below.



Please read the help text next to the fields for specific descriptions.
The “Column 1 Links” fields can be used to display multiple links by clicking the “Add Row” button and can be used to create multiple links.

Investment Profile

This section provides the bordered layout for the investment profiles shown below. Specific classes will provide alternate layouts. Please refer to the class legend at the bottom of this document for details.



Content With Sidebar Section

The content with sidebar section is a specialized version of the two column text section in that it has special CSS rules for styling where the left-hand column is 66% width and the right-hand column is 34% width.

If we look at the Pooled Funds page you'll notice a Content With Sidebar section, expand that and see:

- **Heading** – this is the heading for column 1.
- **Column 1 Content** – this is the body text for the first column.
- **Column 2 Headline** – this is the heading for column 2.
- **Column 2 Content** – this is the body text for the second column.
- **Types** can be: no link, internal page, URL link, and PDF document.

CTA Section (Call To Action)

A CTA section is simply a button that points to a URL and contains 2 fields:

Hide Section – as described in previous sections.
CTA – choose the page that you would like the button to link to. The page's title will be used inside the button for consistency's sake and if the page's title changes, so will any buttons that link to that page.

CTA sections are full-width with a midnight blue background and a button, centred in white.

Accordions

The accordion section is used to collapse long content into clickable titles. Currently used for file archives across the site.

Field descriptions:

Heading – The main heading for the section, independent from each accordion item.
Intro / After Content – Used to display mixed content above or below the collapsable items.
Accordion Items – Click "Add Item" add any number of accordion items.
Label – Displays the clickable accordion title.
Content – Displays mixed content that will be initially hidden. Currently used for document libraries.

Fact Sheets

Currently used on the publications page for downloadable content with a brief description. Shown below.

Field descriptions:

Section Heading – The main heading for the section, independent from the individual fact sheets.
Column # Fact Sheet – Used to upload each document.
Column # Heading – The headings for each fact sheet.
Column # Image – Upload a thumbnail or the document.
Column # Content – To be used for a very brief description of the document.

Grid

This section is used on the https://www.bci.ca/approach/advocacy/collaborations/ page to display logos and mixed content that is initially hidden until a tile is clicked. Shown below.

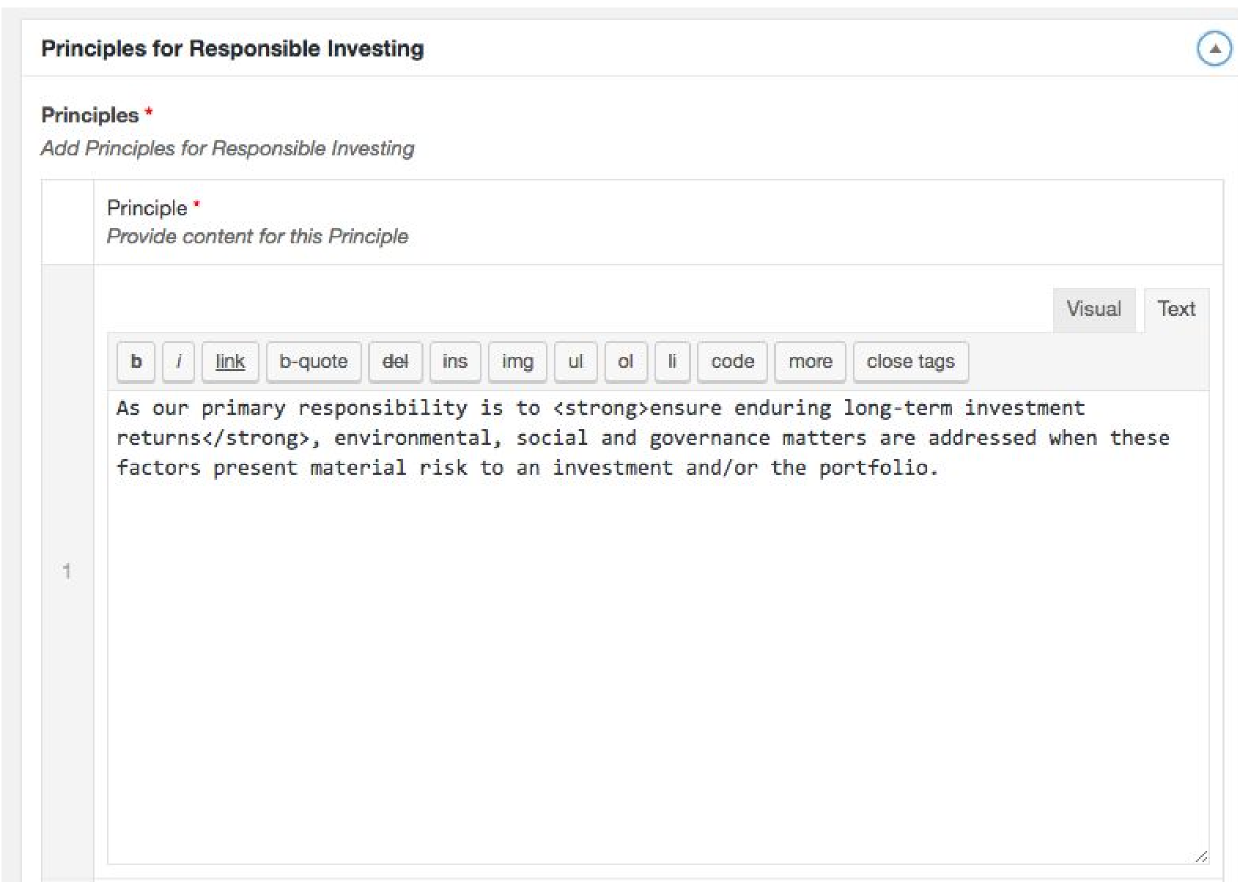
Field Descriptions

Heading – Optional heading for the section.

Number of Items per Row – Sets the number of columns.
Grid Items – Click "Add Item" to add any number of grid items.
Logo – This is what is initially shown when the page is loaded. Ideally logos should be .png file format with a transparent background.
Content – Bullet points used for brief descriptions of each collaborator followed by an external link to the collaborators website.

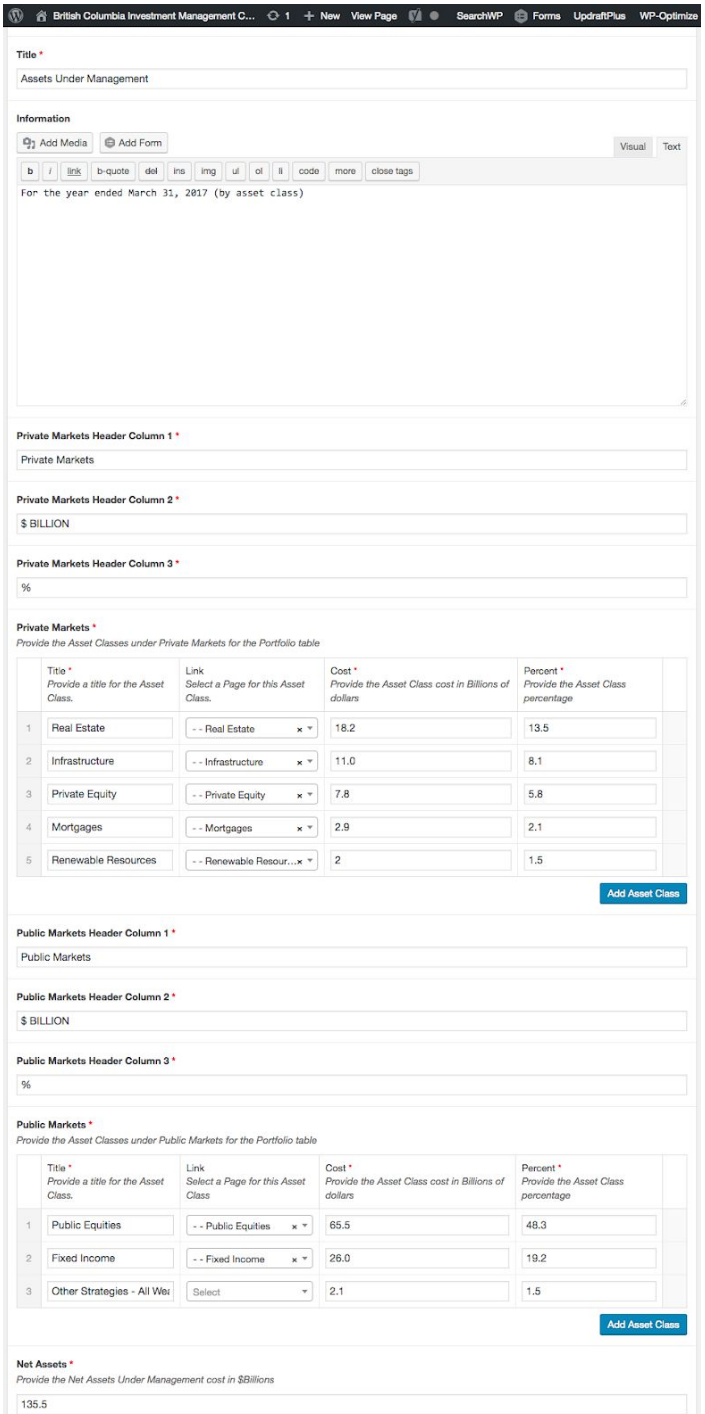
Principles

The Principles of Responsible Investing is rendered by the [principles] shortcode and controlled by the 'Principles for Responsible Investing' custom fields which is a repeater containing the WYSIWYG editor and restricted to 8 items.



Portfolio

The Portfolio Assets Table is rendered by the [portfolio] shortcode and controlled by the 'Asset Class Portfolio' custom fields for Private and Public Markets;


British Columbia Investment Management C... 1 New View Page SearchWP Forms UpdraftPlus WP-Optimize

Title *

Assets Under Management

Information

Add Media | Add Form | Visual | Text

b | i | link | b-quote | del | ins | img | ul | ol | li | code | more | close tags

For the year ended March 31, 2017 (by asset class)

Private Markets Header Column 1 *

Private Markets

Private Markets Header Column 2 *

$ BILLION

Private Markets Header Column 3 *

%

Private Markets *

Provide the Asset Classes under Private Markets for the Portfolio table

	Title * *Provide a title for the Asset Class.*	Link *Select a Page for this Asset Class.*	Cost * *Provide the Asset Class cost in Billions of dollars*	Percent * *Provide the Asset Class percentage*
1	Real Estate	- - Real Estate	18.2	13.5
2	Infrastructure	- - Infrastructure	11.0	8.1
3	Private Equity	- - Private Equity	7.8	5.8
4	Mortgages	- - Mortgages	2.9	2.1
5	Renewable Resources	- - Renewable Resour...	2	1.5

Add Asset Class

Public Markets Header Column 1 *

Public Markets

Public Markets Header Column 2 *

$ BILLION

Public Markets Header Column 3 *

%

Public Markets *

Provide the Asset Classes under Public Markets for the Portfolio table

	Title * *Provide a title for the Asset Class.*	Link *Select a Page for this Asset Class*	Cost * *Provide the Asset Class cost in Billions of dollars*	Percent * *Provide the Asset Class percentage*
1	Public Equities	- - Public Equities	65.5	48.3
2	Fixed Income	- - Fixed Income	26.0	19.2
3	Other Strategies - All Wea	Select	2.1	1.5

Add Asset Class

Net Assets *

Provide the Net Assets Under Management cost in $Billions

135.5

Title - The title on the Asset Classes Portfolio Table
Information - The subtitle on the Asset Classes Portfolio Table
Headings - Column headings for both Private and Public Markets
Markets Table - A Repeater with fields for each table entry; Title, Link, Cost and Percent.

*The Link allows you to select a page on site, and the Cost/Percent are rounded to 1 precision point.
Net Assets - The Net Assets Under Management cost.

Shortcode

– Display mixed content through the use of shortcodes.

Field Descriptions:

ID / Classes – Used with some shortcodes to add styling. Please refer to the class legend for details.
Layout – The Full Width setting will expand the section to the sides of the screen. Contained Width will contain the section to the max width of the website content.
Shortcode – Paste in your shortcode here.
Shortcode reference list:

- [iss_iframe] – Displays the proxy voting record on **https://www.bci.ca/approach/responsible-investing/proxy-voting-record/**
- [principles] – Displays the 8 principles chart on **https://www.bci.ca/approach/responsible-investing/principles/**
  *The custom fields driving this shortcode are found in the Principles section below.
- [portfolio] - Displays the "Assets Under Management" table on **https://www.bci.ca/investments-performance/portfolio/**
  *The custom fields driving this shortcode are found in the Portfolio section below.
- [documents id=###] – Used in accordion sections to display document libraries based on ID, for example the Publications Archive is mainly comprised of these shortcodes; **https://www.bci.ca/publications/archive/**
  Specific ID's for document libraries can be found in the URL bar when editing a document library. The ID will be listed as "post=1234" with the number value varying depending on which item you are editing.
  *The custom fields driving this shortcode are found in the Document Libraries section near the beginning of this document.

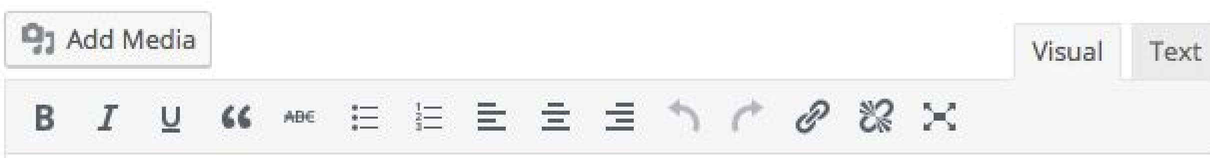
Moving Icons, Slides, and Sections

To move an icon or slide up or down in the list, simply move your mouse to the left-side of the icon section (over top of the number), click and drag the icon or slide up or down in the list and click the Update button.

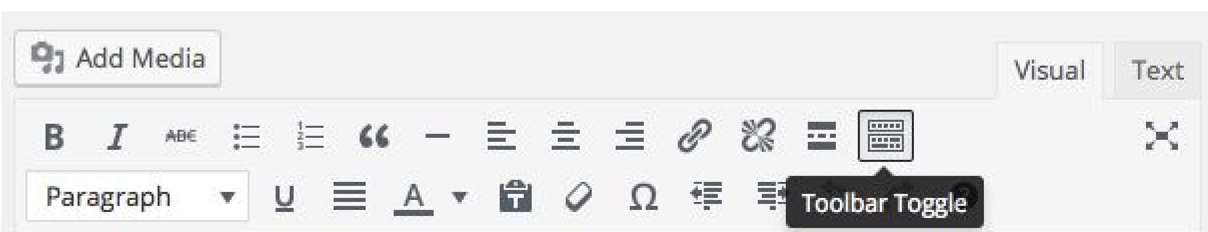
To move an entire section, simply move your mouse to the name of the section, click and drag the section up or down in the list.

The WYSIWIG Editor

For each of your pages, you will typically see a text editor with a toolbar. This is referred to as the "WYSIWIG" (What You See Is What You Get) editor. Using this, you will be able to add, remove, and edit content, similar to the way you would use any document editing program such as Microsoft Word.



You will see formatting options such as bold, italic, underline, and bulleted lists, etc, but try to avoid changing the text alignment, font size, or colour, because doing so will override the preset styling of the site.



If you click the "Toolbar Toggle" button, you will see a second row of editing options available to you, including an eraser icon and a clipboard icon with a T in it. These two buttons are very helpful if you are bringing in content from elsewhere. The clipboard icon ("Paste as Text") allows you to copy and paste content from a different source without including any of the extra formatting that might come with it. If you have already pasted in your content without using the "Paste as Text" button and there is formatting that needs to be removed, you can click the eraser icon ("Clear Formatting") to do so.

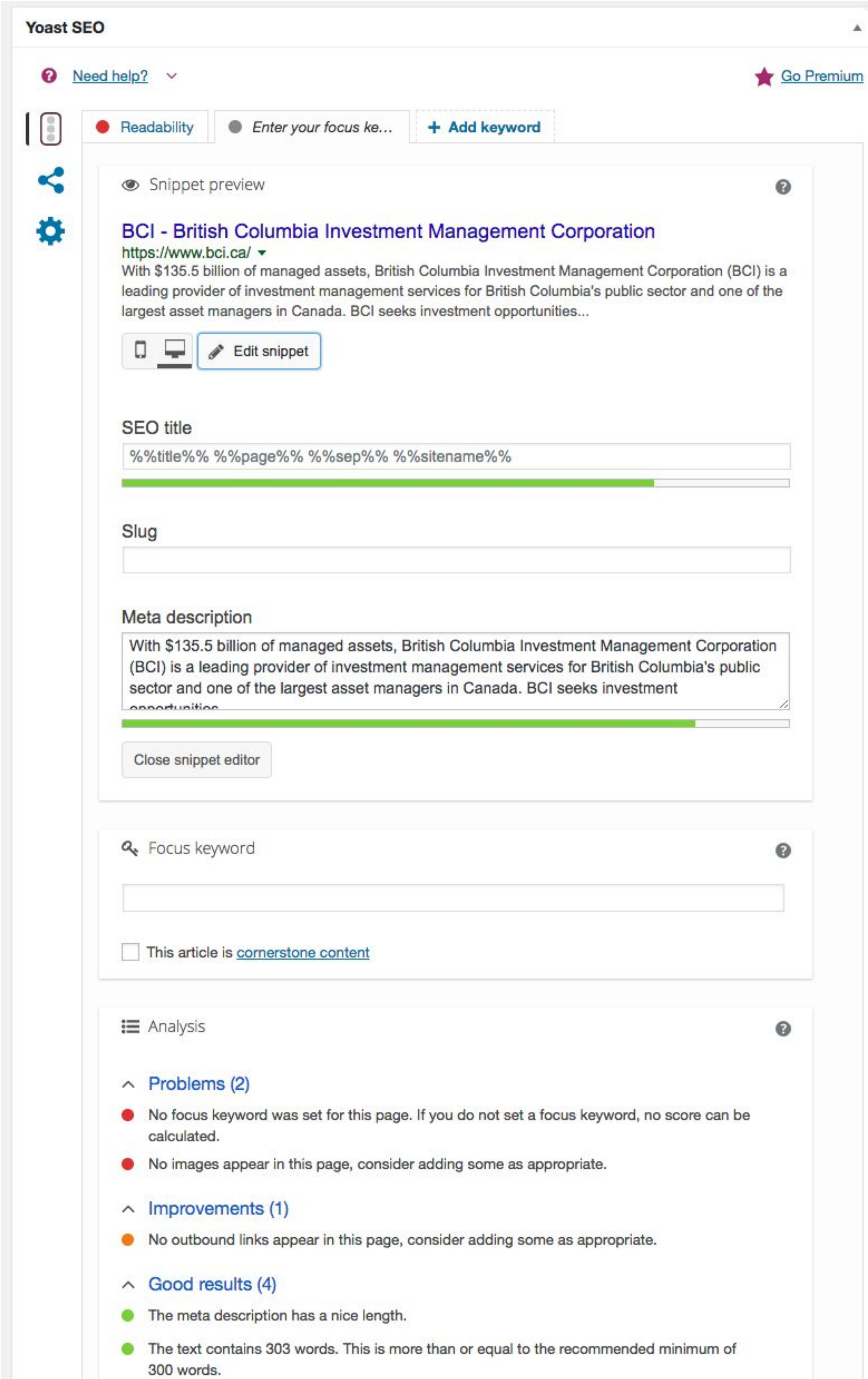
Another useful tool is the link icon represented by a chain link; this allows you to add links to your content. Simply highlight the text you want to use as a link, click the chain icon, and either type in or paste a URL to your site or any other site on the web. Make sure you include the http:// or https:// in front of the link or WordPress will assume that the link is on your site and the link will fail to open correctly.

Once you're done, click Enter/Return or the blue apply button to save your link. If you ever need to edit your link, simply click anywhere on the link itself and then click the pencil icon.

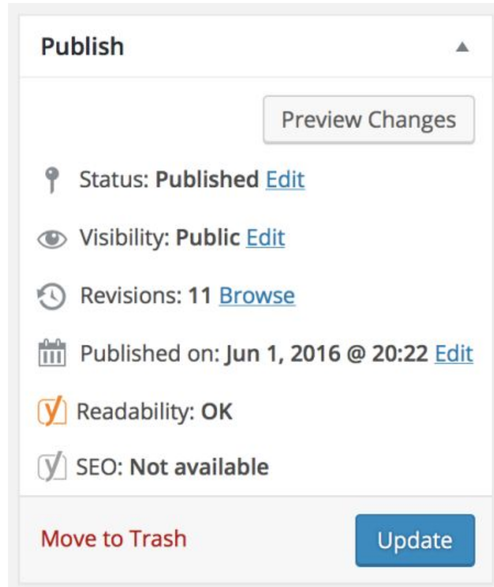
To remove a link, simply edit the link and remove the URL and then click the blue, apply button, or click the X in the tooltip next to the edit icon, or click the break link icon in the toolbar.

Yoast SEO

At the bottom of public content (Pages, Posts/Media Releases and Bios) you'll find the Yoast SEO editor which will allow you to edit your SERP snippet among other things. The SERP snippet allows you to specify a meta title and meta description, if one isn't provided then it will be auto generated from the page content. When viewing the Yoast SEO metabox simply click 'Edit snippet' to get the SEO title, Slug and Meta description fields;


Yoast SEO
Need help?
Go Premium
Readability
Enter your focus ke...
+ Add keyword
Snippet preview
BCI - British Columbia Investment Management Corporation
https://www.bci.ca/
With $135.5 billion of managed assets, British Columbia Investment Management Corporation (BCI) is a leading provider of investment management services for British Columbia's public sector and one of the largest asset managers in Canada. BCI seeks investment opportunities...
Edit snippet
SEO title
%%title%% %%page%% %%sep%% %%sitename%%
Slug
Meta description
With $135.5 billion of managed assets, British Columbia Investment Management Corporation (BCI) is a leading provider of investment management services for British Columbia's public sector and one of the largest asset managers in Canada. BCI seeks investment
Close snippet editor
Focus keyword
This article is cornerstone content
Analysis
Problems (2)
No focus keyword was set for this page. If you do not set a focus keyword, no score can be calculated.
No images appear in this page, consider adding some as appropriate.
Improvements (1)
No outbound links appear in this page, consider adding some as appropriate.
Good results (4)
The meta description has a nice length.
The text contains 303 words. This is more than or equal to the recommended minimum of 300 words.

Saving Your Changes



Once you're done with all of the changes to your page, click the blue "Update" button near the upper-right side of the page. Once it has finished updating, you will see a link appear at the top of the page that says "View Page.", this will allow you to view your page with all of the new content that you just added.

Note: You may also choose to preview your changes before making them visible to everyone. Click the "Preview Changes" button and you will see a preview of your page and the changes you've made.

Status

You'll notice a status dropdown field located in the upper-right of the page in the Publish section, this allows you to set a specific page as 'published', 'pending review', or 'draft' (default). Only pages set to 'published' will be visible to everyone.

Visibility

Not used as often as setting a page to draft, visibility controls who can see the page: 'public' (default), 'password protected' (only users with the correct password can see this page), or 'private' (only you can see this page).

Revisions History

Every time you save or update your page, WordPress keeps track of the revision history for you. So if you made a mistake and need to quickly revert a page back to a previous version, simply click the Browse link and you'll be brought to a page that shows you all of the changes you've made and when you made them.
You can also compare any two versions and WordPress will show you the differences. Clicking the Restore This Revision button will replace the page with the selected revision.
NOTE: There's a known bug in WordPress which requires a minimum of 2 revisions for the functionality to enable. If you only have one simply save a minor edit to trigger functionality.

The Update Button

WordPress will not save your changes until you click the blue, Update button located in the upper-right of the screen. If you attempt to leave a page that you've made changes on, WordPress will prompt you to stay or leave the page, at which point your changes will be lost.

Document Libraries (Publication Archives & Submissions and Comments)

Document libraries are simply collections of documents that can be placed anywhere within a content section. Let's use the Pooled Funds page as an example; if you expand the fourth section (Full Width Bar) and look at the content you'll see this:

[documents id=2189]

But what is that and where did it come from?

This is called a shortcode, which simply means that it's a short piece of code that links to something else that's defined within the site; in this case "documents" or a document library. The ID is the identifier of that document library which can be found by clicking on Doc Libraries in the menu. We've done our best to label each document library so that you know where it will show up on the site, but just to be sure, move your mouse over the Pooled Fund Statement library and look at the bottom of the screen in the status bar and you should see:

https://www.bci.ca/wp-admin/post.php?post=2189&action=edit

Notice that the shortcode above has an ID of 2189? Notice also that the link to the doc library is also 2189, which means that this document library is being referenced from the Pooled Funds page.

Click on Pooled Funds Statements and it will show you the libraries contents.

The document library name is shown above the document library wherever it is added.

Enable Dates toggle – this toggle allows you to show full dates on the documents.
Enable Year Filter toggle – this toggle enables the year links used for sorting purposes to the right-hand side of the documents.
Documents repeater:

- Title – this is the title of the document that will be the clickable link to that document. It may be different than the title of the document itself.
- Date – the date that you would like displayed underneath the title.
- Date Display radio buttons – either Display Day or Month: would you like the date to display the month and day, or just the month?
- Type – PDF Upload or Uberflip link:
    - PDF Upload allows you to choose a PDF document within the media library.
    - Uberflip link allows you to choose an external link.

Documents within a library can be reordered just like any other repeater by clicking and dragging on the number on the left. Don't forget to save once you've changed the order of a library and please note that the library will change in every location that it's been placed on every page.

In order to move documents from one library to another, we would recommend:

- Add the document to the new library first.
- Remove the document from the original library second.

Document Posts (Adding a new document)

In some cases, there isn't a PDF for a particular document, so an HTML equivalent needs to be created.

1. Click on Posts in the menu.
2. Click on the Add New button.
3. In the box at the top of the page, add your document title.
4. In the content body editor, copy the text from the Word document for this post and paste it into the big box.
5. Format the text to look the way you'd like it to be including bold, italics, and links to other sites. Please note that any link that's not in BCI site should have the "open in a new window" checkbox selected.
6. In the upper-right, you should see the Publish panel, make sure to set the published date to the date of this document.
7. Click Publish.

Document Posts (Editing an existing document)

1. Identify the document that you wish to edit.
2. Click on the title of the document.
3. Change the title or body content to your needs.
4. If you need to change the published date, click on the edit link in the Publish panel to the right of the Published online.
5. Click Update.

Adding/Editing Bios

To add a new bio, click the Add Bio button.

To edit an existing bio, click on the Bio name:

1. The box at the top of the page is the name of the bio itself.
2. The body content area is where you would put all of the bio details that you wish to see for this person.
3. Under the Bio Details panel, choose this person's role.
4. Enter this person's position in the position field.
5. Select the toggle for Committee Member.
6. Disable profile toggle is only used for vacant positions.
7. Add the triplet teasers for this person.
8. Click Publish or Update to save.

To create a role:

1. First create the role page under Who We Are in its entirety before continuing. It may be helpful to find an existing role page such as Board Committees, click Clone to make a copy of that page, and then change the contents of the page to what you require.
2. Once the role page has been created, click Bios in the menu, and then choose Roles.
3. To add a new role; enter the role name in the field, enter the slug (this is just the role, lowercase with no spaces. Use dashes instead of spaces, eg. "board-member").
4. Descriptions have been left blank so far.
5. Role Page – choose which page you would like to associate with this role and is used as the back link on profile pages for members associated with this role.

If you need to edit a role, simply:

1. Click Bios in the menu, and then choose Roles.
2. You may change the role name in the field, and update the slug (this is just the role, lowercase with no spaces. Use dashes instead of spaces, eg. "board-member").
3. Descriptions have been left blank so far.
4. Role Page – choose which page you would like to associate with this role and is used as the back link on profile pages for members associated with this role.

Contact Forms

Contact forms can be placed anywhere within a content block or shortcode section by entering the ID of the form inside a shortcode like this:

[gravityform id=1 title=false description=false ajax=true]

You can find the ID of the form by clicking on Forms from the WordPress main menu, find the contact form that you would like to use and notice the ID column.

To edit a contact form, simply click the edit link and you'll see all of the form elements.

Important things to note about contact forms:

- the interface is drag and drop, so choose an item from the right and drag it to where you would like it to appear on the form.
- click the element on the left side of the page to open up the options for that type broken into General/Appearance/Advanced tabs.
- there is a checkbox for the required field on the General tab.
- under the Appearance tab you can add things like placeholder text and the field size.

Accessing Contact Form Submissions

To access the entries for your form, simply:

1. Log into WordPress using your username and password.
2. Click on the Forms link in the menu on the left in the black bar.
3. You should see Contact Us in the forms list; hover over that link and notice that some other options appear for you, click on the Entries link.
4. You should now see 26 entries (as of me writing this email) that you can:
    - sort in ascending order by Name, Email, Company, Type of Inquiry, or Message by simply clicking on the column name. Clicking on the column name again will sort that column in descending order.
    - search by entering search text in the search box (upper-right) of the page and clicking on the Search button.
    - you may also search by specific form fields, but I usually find it best to search any form field so that I don't miss anything personally.

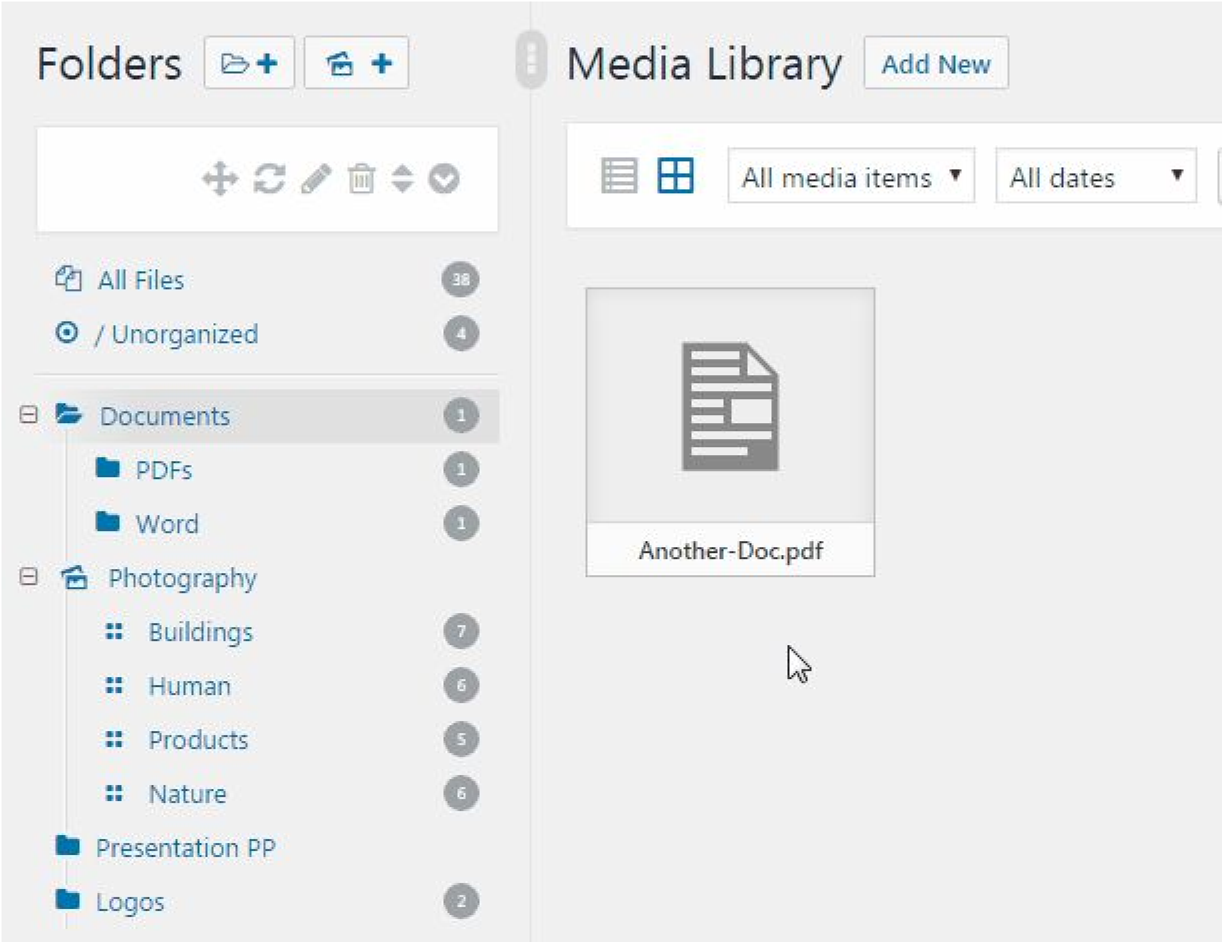
5. You can read the message in the far right-hand column, or you can hover over the name and notice that some other options appear for you; View, Mark Read, Spam, and Trash
   - click on View to see the full message
   - click on Mark Read to mark that message as having already been read
   - click Spam to mark that entry as a spam message
   - click Trash to delete the message and place it in the Trash bin. If you accidentally trash or spam a message, notice the Spam and Trash links just above the messages; click on those links to rectify the issue or remove all Spam or Trashed messages.
6. You can also star messages as a flag to come back to by simply clicking on the star to the left of the message. When you have starred messages, you will also see only starred items under the Starred link above the message list.

Media Library

The media library isn't another content editor but is a resource for organizing, editing and sourcing media (Images and Documents) for your website. Details on the Media Library interface can be found here;

https://codex.wordpress.org/Media_Library_SubPanel

Along with the default functionality provided by WordPress we've extended the Media Library with the '**WP Real Media Library**' plugin to provide virtual folders for organizational purposes;


Folders
Media Library
Add New
All media items
All dates
All Files 38
/ Unorganized 4
Documents 1
PDFs 1
Word 1
Photography
Buildings 7
Human 6
Products 5
Nature 6
Presentation PP
Logos 2
Another-Doc.pdf

Class legend

Style:

- **button** - This class can be added to links to stylize the link as a button.
- **button transparent** - When these classes are used together, the button will take on an alternate style for coloured backgrounds.
- **bottom-border** - Adds a dividing line below a section.
- **noborder** - This class is used in the *Investment Profiles* section to customize the style of the left column by removing the border and reducing the spacing around the title.
- **career** - Uniquely used on a *full-width-bar* section on the career opportunities page to generate the styles in the blue section.
- **no-background** - In *two-column-text* sections, this class will remove the grey background and centre the text in the right hand column.
- **text-only** - In *two-column-text* sections, this class will restyle the headings and spacing as seen on the Board of Directors page.
- **breadcrumbs** - Mandatory class used in the shortcode section in conjunction with the breadcrumbs shortcode.
- **infographic** - Optional class used in *full-width-bar* sections to remove the default border from infographics and add spacing between the content and image.
- **infographics** - In *two-column-text* sections, this is a required styling class for side by side infographics.

Spacing:

By default all sections will have 60px of space on the top and bottom. The spacing classes are used to manipulate that space for section-specific adjustments.

- **top** - Removes 30px from the bottom of the section.
- **middle** - Removes 30px from the top and bottom of the section.
- **bottom** - Removes 30px from the top of the section.

Layout:

- **heading** - When this class is used on a *full-width-bar* section, the padding will be reduced and the heading will be centred.
- **center** - Used in any class field to centre the text.
- **intro** - This class is generally used in the first *full-width-bar* section of each page. Content with this class will be centred and contained to a maximum width of 1000px.
- **file-blocks** - This class is used on *two-column-text* sections to generate side by side grey boxes with blue title bars.

Resources

WordPress Documentation - **https://codex.wordpress.org/**

WordPress Support Forum - **https://wordpress.org/support/**

About WordPress - **https://codex.wordpress.org/About_WordPress**

Troubleshooting WordPress - **https://codex.wordpress.org/Troubleshooting**

Getting Started with WordPress - **https://codex.wordpress.org/Getting_Started_with_WordPress**

Working With WordPress - **https://codex.wordpress.org/Working_with_WordPress**

Administrative Panels - **https://codex.wordpress.org/Administration_Panels**

Editing Posts - **https://codex.wordpress.org/Posts**

Editing Pages - **https://codex.wordpress.org/Pages**

Post Status - **https://codex.wordpress.org/Post_Status**

Duplicate Post - **https://duplicate-post.lopo.it/docs/general/usage/**

Media Library - **https://codex.wordpress.org/Media_Library_SubPanel**

Your Profile - **https://codex.wordpress.org/Users_Your_Profile_Screen**

WordPress SEO - **https://yoast.com/wordpress-seo/**

Yoast SEO Knowledgebase - **https://kb.yoast.com/kb/category/yoast-seo/**

Advanced Custom Fields - **https://www.advancedcustomfields.com/resources/**