

TRAINING PLANS

Training I - Complete

- *Introduction to the WordPress dashboard*
- *Editing content pages*
 - *Text Editing*
 - *Headings, formatting, and links*
 - *Images (including the full-width image and Our Team headshots)*
- *Managing projects*
- *Managing news stories*

Training II

- Full Help Reference
- Changing headshots on the Our Team page
- Linking to PDFs in page content
- Modifying the Homepage Employee Testimonial
- Setting the Homepage Featured Video and Image
- Custom sidebar widgets
- Managing careers

FULL HELP REFERENCE

To access full help documentation, visit staging.rbiva.com/help. After launch, visit rbiva.com/help. Here's a list of the topics covered:

- Introduction to the WordPress Dashboard
- Text Editing
 - Tips for Text Editing
 - Adding Images
- Managing Content Pages
 - Changing the Full-width Image
 - Editing the Page Title and/or Content
 - Checklist to Ensure a Page Is Ready for Updating or Publishing
- Custom Sidebar Widgets
 - Creating/Editing Widgets
 - Inserting a Widget into a Page
- Managing Projects
 - Creating a Project
 - Editing a Project
 - Checklist to Ensure a Project Is Ready for Updating or Publishing
- Managing News
 - Creating a News Story
 - Editing a News Story
 - Checklist to Ensure a News Story Is Ready for Updating or Publishing
- Managing Careers
 - Creating a Career Entry
 - Editing a Career Entry
 - Checklist to Ensure a Career Entry Is Ready for Updating or Publishing
 - Managing Expired Career Entries
- Image Reference

ADVANCED CONTENT TOPICS

- Creating Content Pages
- Editing In-page Menus
- Adding Buttons
- Linking to PDFs
- Modifying Page Layouts Using the Page Builder
- Changing Headshots on the Our Team Page
- Modifying the Homepage Employee Testimonial
- Setting the Homepage Featured Video and Image
- Modifying the Contact Form Recipients
- Excerpts and Previewing in Yoast SEO
- Troubleshooting
- Learning more

TECHNICAL REFERENCE

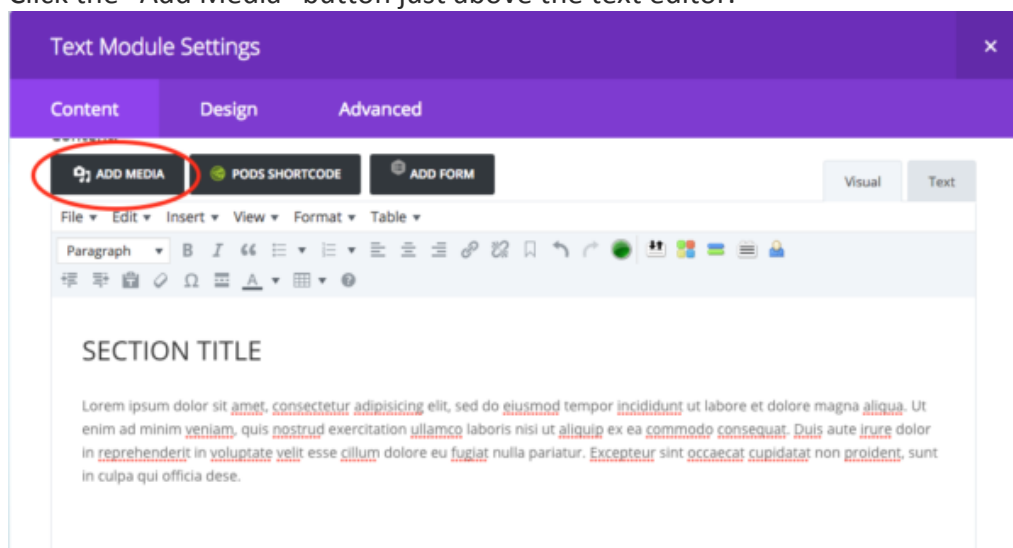
- Guide to Plugins
- Updating the Site
- User Management

CHANGING HEADSHOTS ON THE OUR TEAM PAGE

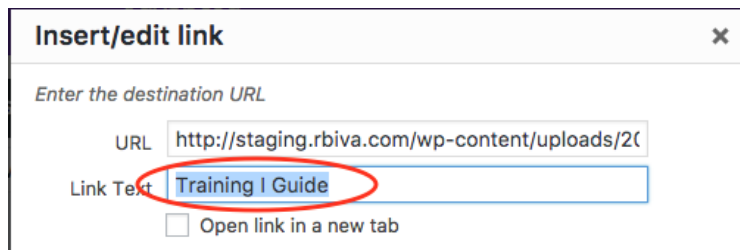
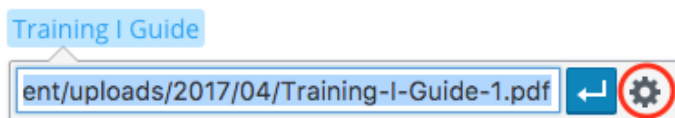
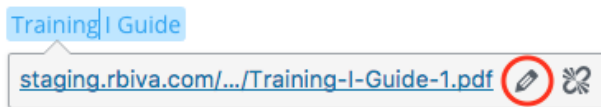
1. Open the Our Team page and edit the page. Scroll down to the section containing the headshots and bios (you'll know by the module labels).
2. Open the “picture and info” module for the person whose headshot you're looking to change.
3. Click on the headshot image already in the module and click the pencil icon.
4. Select “Replace”.
5. If you haven't already, upload the new headshot by dragging it into the media library. Be sure it is the correct dimensions (150 x 150px) before you upload. You'll also want to be sure to give it a title and alt tag.
6. Click “Replace”.
7. Click “Save and Exit” in the module. Be sure to save your changes to the page.

LINKING TO PDFS IN PAGE CONTENT

1. Open the text module where you'd like to link to the pdf.
2. Put your cursor where you would like to link to the pdf.
3. Click the “Add Media” button just above the text editor.



4. Drag the pdf into the media library that appears.
5. Make sure the pdf you just imported is selected, and then click “Insert into Page”.
6. It will automatically use the name of the document as the text that links to the pdf. If you'd like to change the text, click on the text and then on the pencil icon that appears. Then click on the gear icon, and you'll see a “Link Text” field where you can adjust the text. Click “Update” to save your text changes.



7. Be sure to save your changes and update the page or save a draft as necessary.

MODIFYING THE HOMEPAGE EMPLOYEE TESTIMONIAL

1. Open the Homepage and edit the page. Scroll down to the modules entitled “Testimonial (desktop)” and “Testimonial (phone)”.
2. Click on one of the testimonial modules to edit.
3. **To change the headshot**, scroll down to the “Portrait Image URL” field and click “Upload an Image”. Upload the new image by dragging it into the media library that appears. Be sure it is the correct dimensions before you upload (90 x 90px). You'll also want to be sure to give it a title and alt tag. Click “Set as Image”.
4. **To change the name, job title, company name, or bio content**, scroll down to those fields within the testimonial module.
5. Save your changes.
6. **IMPORTANT NOTE:** You'll need to adjust the content in both the “Testimonial (desktop)” and “Testimonial (phone)” modules in order for it to show up correctly on all devices.

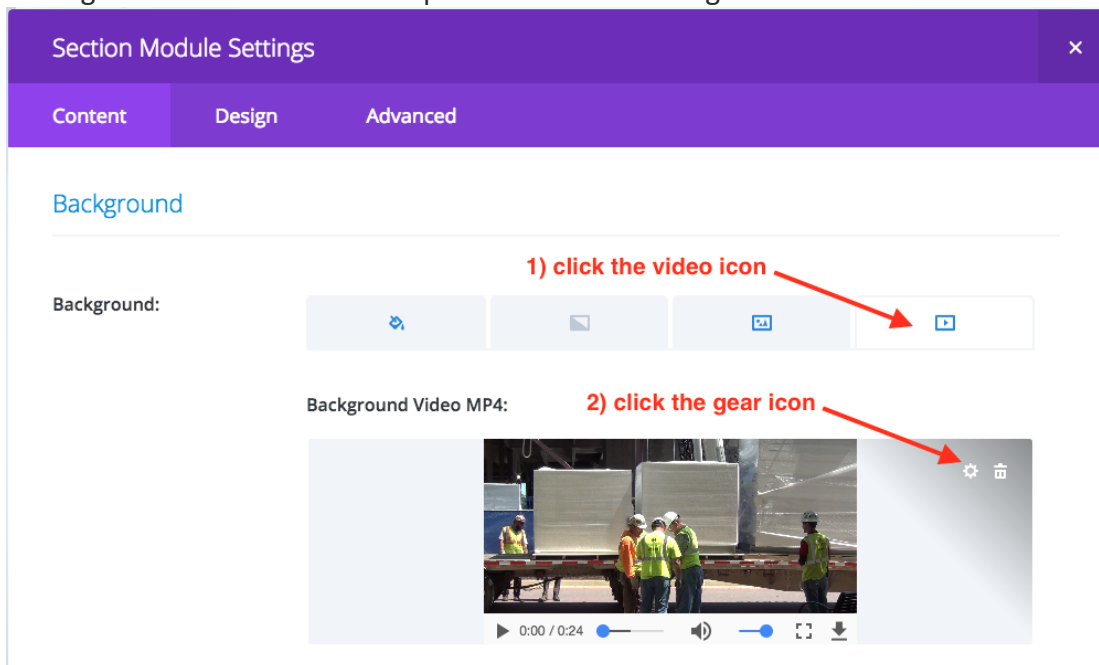
SETTING THE HOMEPAGE FEATURED VIDEO AND IMAGE

IMPORTANT: You will have to set both the background image and video in order for this section to display correctly in all browsers and devices.

1. Open the Homepage and edit the page.
2. Open the **section** containing the “Fullwidth Header”.

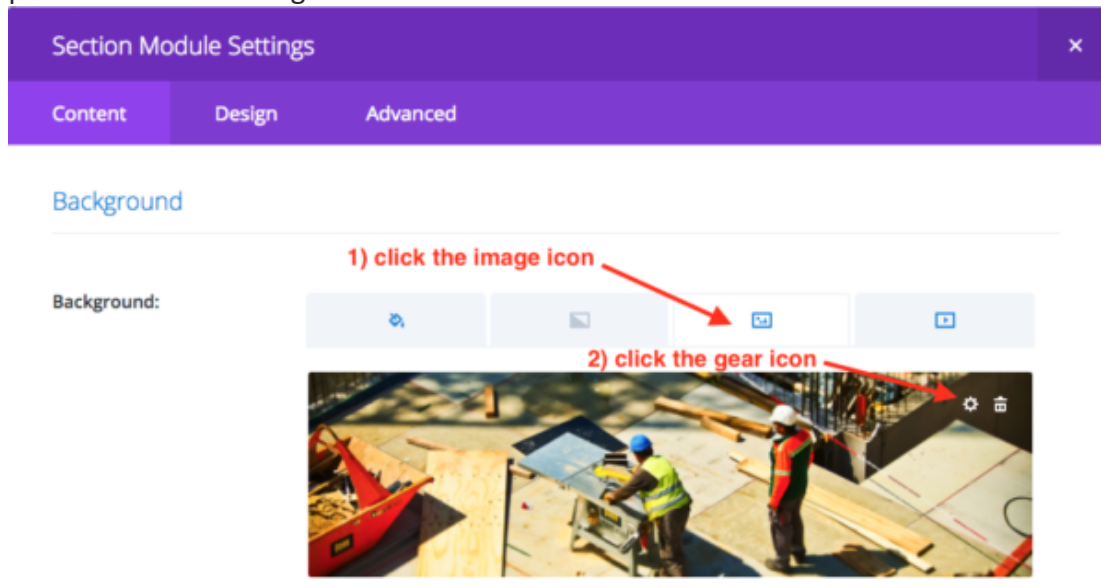


3. **To set the featured video**, click on the video icon at the top, and then hover over the “Background Video MP4” video preview and click the gear icon.

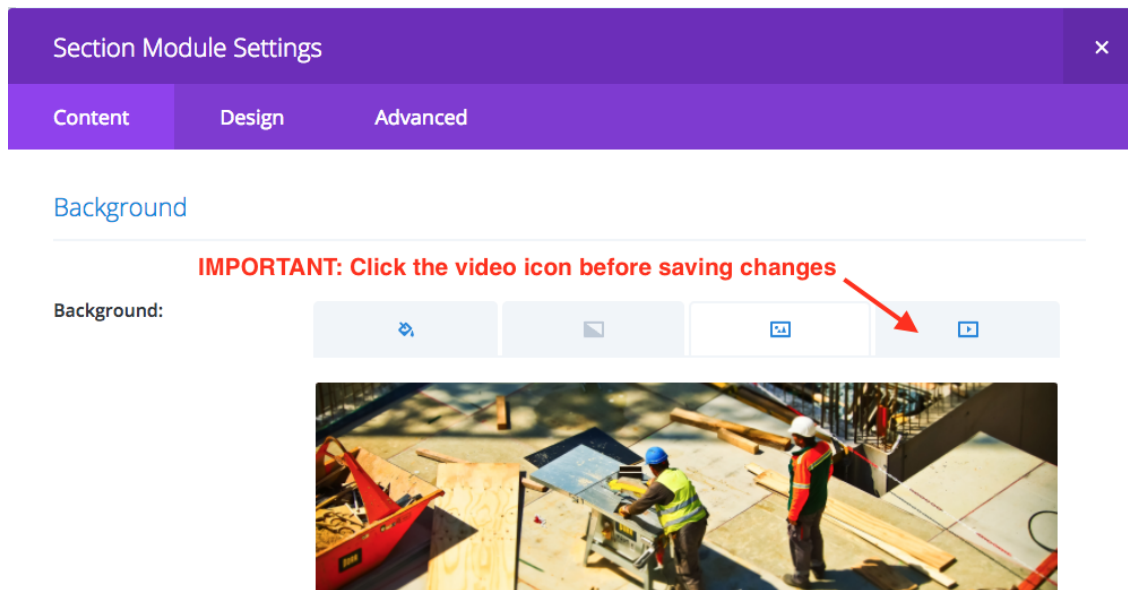


4. Upload the video by dragging it into the media library that appears. You'll want to be sure that it is the right dimensions (1080 x 1920px). **IMPORTANT NOTE:** If the video is not the correct dimensions, it will not display properly in all browsers.
5. Click “Set As Background Video”.
6. **Be sure to scroll down within the module and repeat these steps with the “Background Video Webm”.**

7. To set the featured image, click the image icon at the top, and then hover over the image preview and click the gear icon.



8. As before, upload the image by dragging it into the media library that appears. You'll want to be sure that it is the right dimensions (1080 x 1920px).
9. **THIS IS VERY IMPORTANT:** Before you save your changes within the module, you must click on the video icon at the top. That way, it knows to use video on desktop, and to fall back to images on mobile.



10. Save your changes within the module.
11. **As always, be sure to preview the page before you update.** It's perhaps even more important in this case, as the homepage is the most intricately styled page on the site.
12. Update.

CUSTOM SIDEBAR WIDGETS

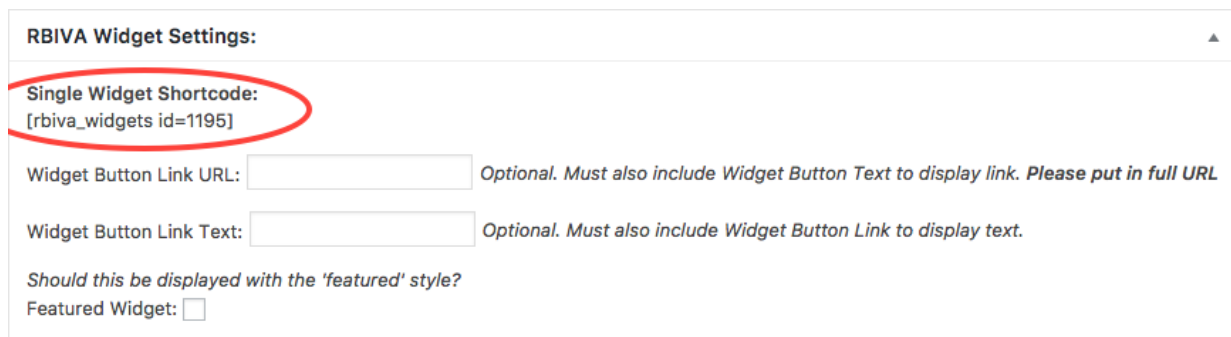
CREATING/EDITING WIDGETS

Custom Sidebar Widgets can be created and managed from the “Sidebar Widgets” menu in the dashboard. Widgets have the following content (mandatory elements are marked with “*“):

- Title*
- Content*
- Widget Button Link URL
- Widget Button Link Text
- Featured Widget? (yes/no)* – Featured widgets are styled more prominently than non-styled widgets, and should generally be first on the page

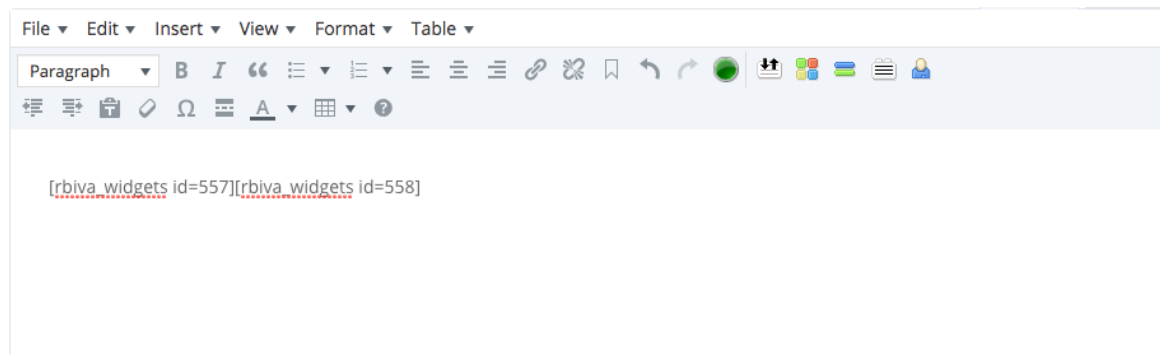
INSERTING A WIDGET INTO A PAGE

Widgets generally go in the “sidebar” module on content pages. To insert a widget, you will need to copy the “Single Widget Shortcode” from within the widget editing view as shown below.



The screenshot shows the 'RBIVA Widget Settings' form. The 'Single Widget Shortcode' field, containing '[rbiva_widgets id=1195]', is circled in red. Below it are input fields for 'Widget Button Link URL' and 'Widget Button Link Text', both with optional instructions. At the bottom, there is a checkbox for 'Featured Widget'.

Paste the shortcode into the “Sidebar” text module on the page where you want it to appear. You can include multiple widget shortcodes, ordered from top to bottom, and pasted on the same line.



The screenshot shows a text editor interface with a menu bar (File, Edit, Insert, View, Format, Table) and a toolbar. The main text area contains two shortcodes: '[rbiva_widgets id=557][rbiva_widgets id=558]'. The shortcodes are underlined in red.

MANAGING CAREERS

CREATING A CAREERS ENTRY

1. Go to Careers > Add New in the Dashboard.
2. Enter the Career Title at the very top of the page.
3. Enter the Location.
4. Enter the Bird Dog Link. Note: this should be a full url with “http://” at the beginning.
5. Select the appropriate Career Type(s) on the right-hand side of the page, if necessary. Note: this is optional. Career types determine where Career Entries are displayed:
 - o All Career Entries are displayed as “Open Positions” on the [Careers](#) Page
 - o Career Entries with the “construction” Career Type selected are displayed as open positions on the [Construction](#) Page
 - o Career Entries with the “service” Career Type selected are displayed as open positions on the [Service](#) Page
6. If applicable, Click “Enable Post Expiration” and set a date that the post should expire.
7. You do not have to preview Career Entries.
8. Publish.
9. Verify that the Career Entry is displaying correctly on the [Careers](#) Page (and the [Construction](#) or [Service](#) page as applicable).

EDITING A CAREER ENTRY

1. Go to Posts in the Dashboard and click on the Career Entry you'd like to edit.
2. Go through the checklist below to make sure everything is set correctly.
3. Update.
4. Verify that the Career Entry is displaying correctly on the [Careers](#) Page (and the [Construction](#) or [Service](#) page as applicable).

MANAGING EXPIRED CAREER ENTRIES

When a Career Entry expires, it will be set to “Draft” status, meaning it will no longer show up to users on the site. You can see “Draft” Career Entries by clicking on “Careers” in the dashboard. From there, you can mouse over the Career and click “quick edit” to adjust the expiration date and publication status of the Career, or you can click “Trash” to delete it.