/* DO NOT DO LIST */

Monday, October 17, 2016 11:30 AM

All DO NOT DO's will be stored here.

Do NOT EVER Change additional parameters in presentation details

Tuesday, April 04, 2017 3:20 PM

DO NOT EVER CHANGE/DELETE/REMOVE/REPLACE/ALTER THE INFORMATION IN ADDITIONAL PARAMETERS.

This goes double for any settings in: PageNavigation, PageHeader or PageFooter.

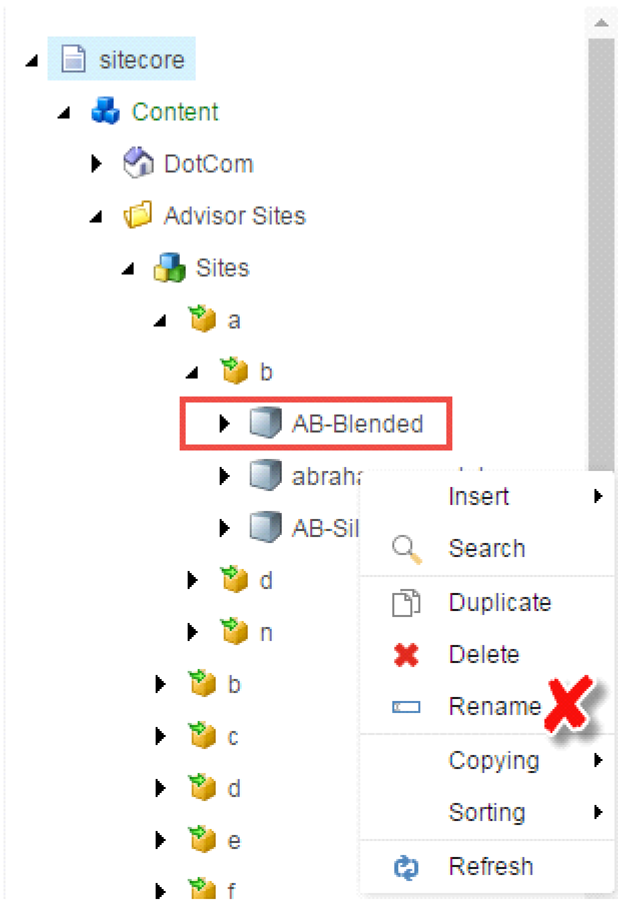
Do **NOT** Rename Site From Content Editor

Monday, October 24, 2016 2:49 PM

List of things that are critical to platform stability:

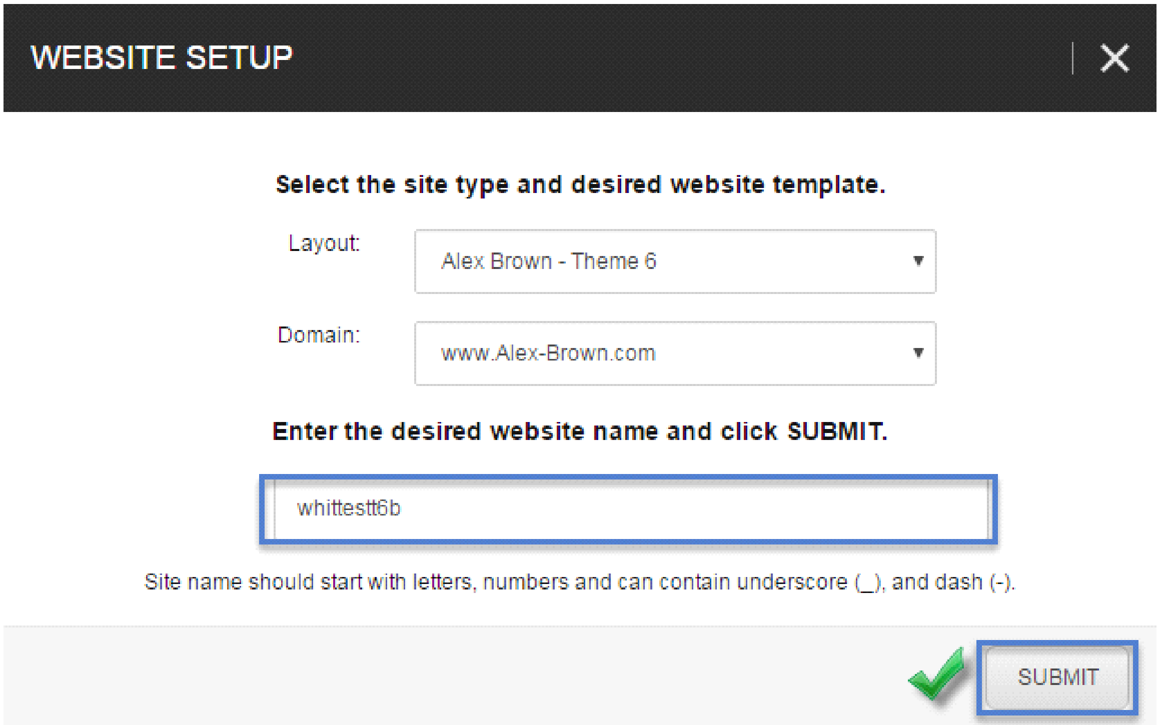
1) DO NOT RENAME or DELETE your site from within the content tree. Renaming MUST be performed from within the website management area.

EXAMPLE - DO NOT DO:



INSTEAD - RENAME IN WEBSITE MANAGEMENT:

THEN:


WEBSITE SETUP
Select the site type and desired website template.
Layout:
Alex Brown - Theme 6
Domain:
www.Alex-Brown.com
Enter the desired website name and click SUBMIT.
whittestt6b
Site name should start with letters, numbers and can contain underscore (_), and dash (-).
SUBMIT

Do NOT Delete Any Site, ever.

Monday, October 24, 2016 2:50 PM

All Sites on Production will be kept for compliance reasons, please do not make any test sites on production, this is what QA is for.

DO NOT MANUALLY ADD PEOPLE TO SITE

Friday, November 04, 2016 12:56 PM

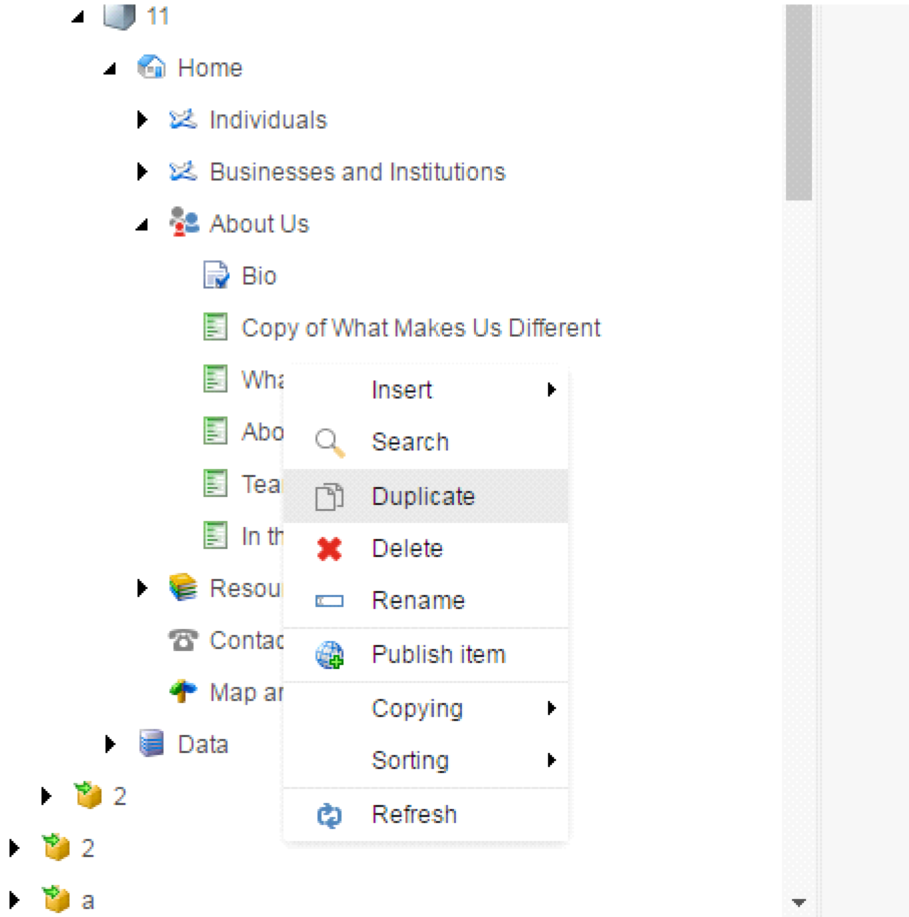
Site WILL NOT SAVE, no one can be added to the site if they do not have a CSS ID, there APPEARS to be a workaround, however due to the way the site works, DO NOT EVER MANUALLY ADD PEOPLE THROUGH THE CONTENT EDITOR

DON'T.
EVER.

DO NOT Duplicate Items

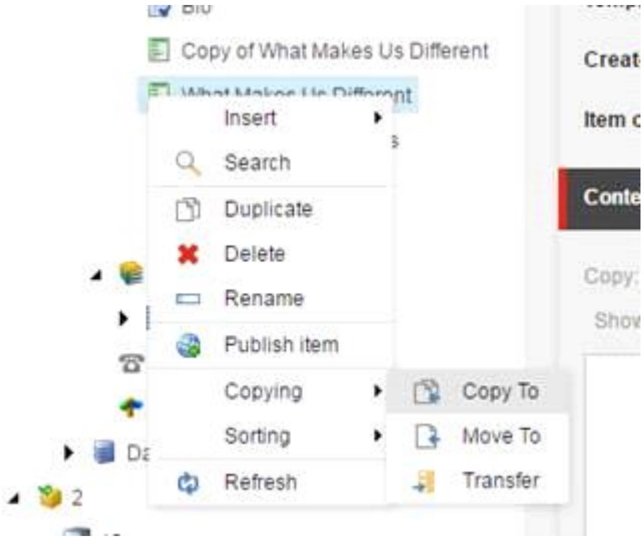
Monday, November 07, 2016 6:07 PM

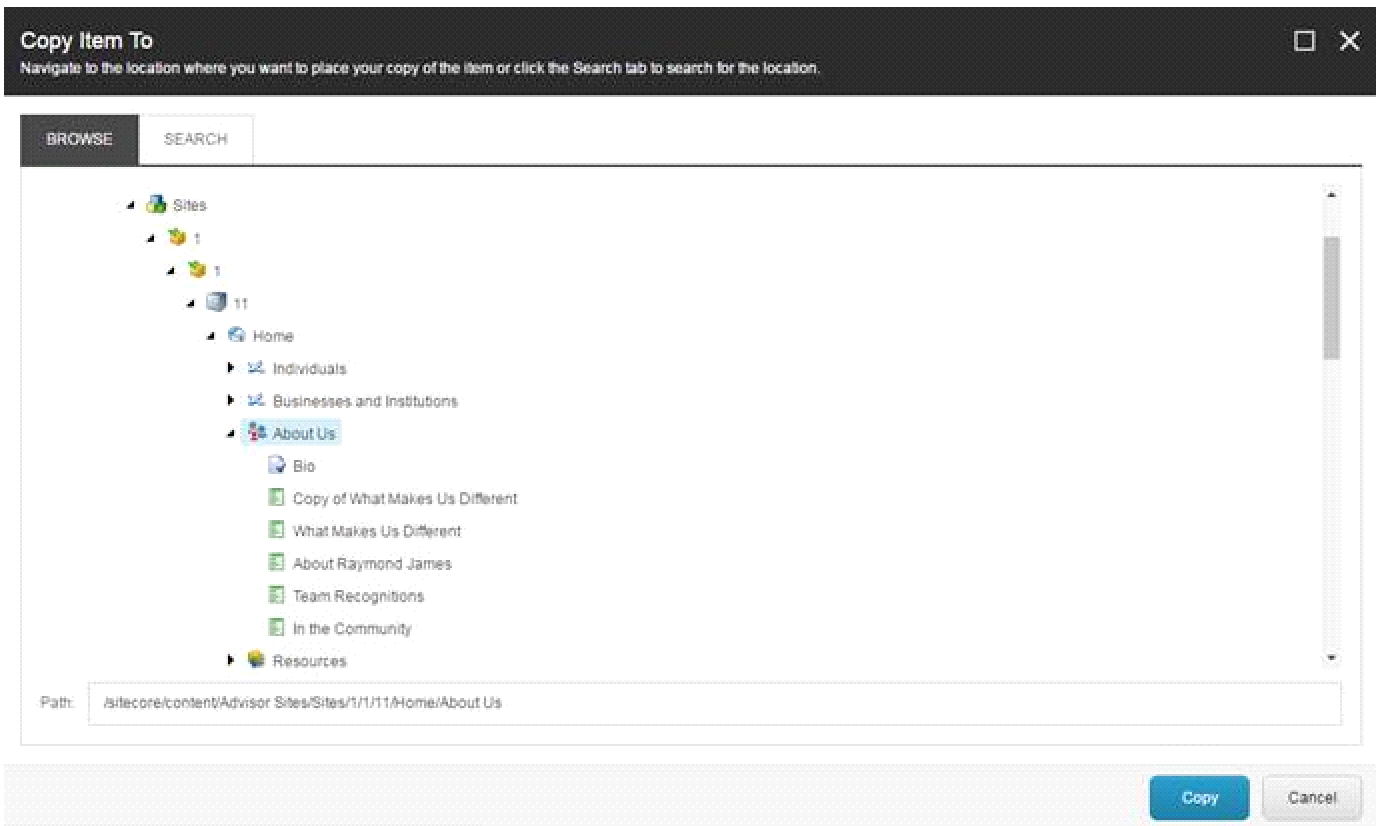
Duplicating items within the content editor will place the new copy in random locations



Instead use the following steps, to accomplish the same outcome

1) Right Click > Copying > Copy To
2) Select the Parent Folder of the item
3) Hit “Copy”


Copy of What Makes Us Different
Insert
Search
Duplicate
Delete
Rename
Publish item
Copying
Sorting
Refresh
Copy To
Move To
Transfer


Copy Item To
Navigate to the location where you want to place your copy of the item or click the Search tab to search for the location.
BROWSE
SEARCH
Sites
Home
Individuals
Businesses and Institutions
About Us
Bio
Copy of What Makes Us Different
What Makes Us Different
About Raymond James
Team Recognitions
In the Community
Resources
Path:
/sitecore/content/Advisor Sites/Sites/1/1/11/Home/About Us
Copy
Cancel

DO NOT Manually add addresses

Wednesday, December 07, 2016 2:11 PM

Do not manually add any addresses to a site, all address should come from CSS.

DO NOT Manually add Phone numbers

Wednesday, December 07, 2016 2:12 PM

Do not manually add a new phone numbers to a site, all phone numbers should come from CSS.

The exception is are phone numbers on advisors bio pages (direct numbers)

SiteCore 8 Quick Information

Monday, October 24, 2016 3:30 PM

Account Information

Thursday, December 08, 2016 2:17 PM

Trello Login

Friday, June 10, 2016 10:21 AM

Trello Admin Account
Username: webservices@raymondjames.com
Pass: webservices

Sitecore 8 Login Info

Friday, June 10, 2016 1:03 PM

Prod: https://scrcm01apwpd.rjf.com/sitecore/
Username: your RJ login
Password: your RJ pass

TESTING LINK ONLY
Qa: https://scrcm01apwq0a.rjf.com/sitecore/
Username: your RJ login
Password: aatest

Advisor Feature Requests

Thursday, October 27, 2016 2:08 PM

If an advisor requests something that the site does not currently do, or have, please tell them something like this:

We will collect this feature request. If there are enough requests for this feature we will submit it to the developers working on Sitecore.

Add the feedback to https://workspaces.rjf.com/sites/Marketing/webdevelopment/Lists/WebsitesSiteCore%20Feedback/AllItems.aspx

Best Practices

Monday, January 09, 2017 4:45 PM

ALT Tags Format

Tuesday, January 10, 2017 2:10 PM

Bio Images: Person's Name + Bio Image|Photo|Picture
Logos: DBA name + Logo
Team Photo: DBA name + Team Photo|Image|Picture

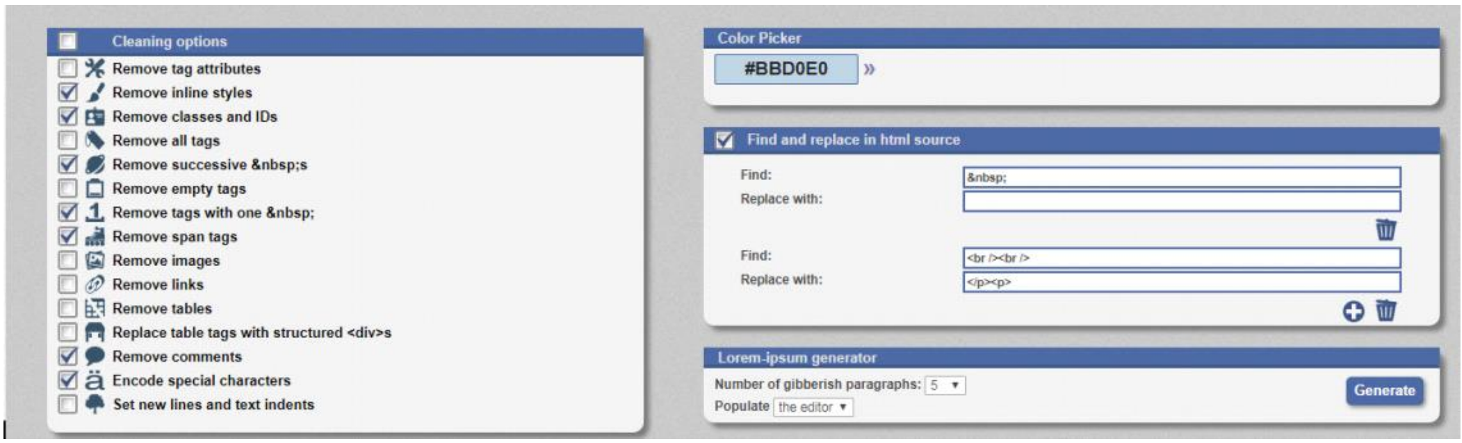
Other images should use the administrator's best judgement. ALT tags are for TTY (text to speech) devices, please describe your image in the same way you would describe it to a visually impaired person.

Formatting HTML code

Monday, January 09, 2017 4:47 PM

1. Use www.html-cleaner.com to clean up any HTML migrated from any site
2. Do not add additional inline styles
3. Use clean html, do not use nested code unless it is semantic
4. Use the following settings:
    a. Find:
    b. Replace: (press space bar in the field)
    c. Find:

    d. Replace: </p><p>



Headings (html)

Thursday, July 13, 2017 2:37 PM

SC8 Banners automatically use H1
Start with H2 as your first header, and work down from there as needed.

Naming Conventions

Monday, September 19, 2016 1:23 PM

- **Sitenames**
  - should always be in lowercase
- **Components**
  - should be named after what section the component is for, so that you can easily tell what you are working on
  - These can be shortened where applicable, and any long page names should be shortened so that you can still tell what page the component appears on, but not so long that its name is hard to remember.
- **Media Library Items**
  - Items should be named as needed to better tell you what they are:
    - Bio Pictures should be the name of the advisor:
      - FirstnameLastname (JamesHood)
      - The pictures should be renamed before upload
      - All images should have an appropriate name that tells you what the image is and what it is in reference to.
        - IE: Advisor sends in a graph for an article, that graph should be referred to by what the data contains and what the article is.
          - Examples: Stock-Dividends-July-2017.jpg
  - You cannot mix spaces with dashes in a file name. It is preferred that you do not uses dashes in a file name at all. SC8 turns spaces in to dashes in a file names url, therefore it confuses the system if there are spaces and dashes.
    - EXAMPLES:
      - A file-name (DO NOT USE)
      - A file name (SAFE, but not advised)
      - a-file-dash (SAFE)
  - Alts and descriptions must be used (you can use the same text you would use in alt)
  - This pertains to ALL files uploaded to the media library, regardless of type.

Site Creation

Monday, January 09, 2017 4:45 PM

Best Practice located here: G:\GROUPS\Advisor Services\Advisor Products\Web Marketing Manager\SC8 Documentation

BestPractice Sitecore8 NewSiteCreation

Billing Process

Friday, November 04, 2016 12:46 PM

To add billing information for a site:

1. Open up website management
2. Find your site, click on your site
3. On the upper right look for the button "Navigation" select "Billing & Support" (Tip: clicking on the star will pin an item to the left of the navigation button)
4. Monthly Charges
    a. Click Add Monthly Charge Item
    b. Select Service Level, Bill to, and purchase date, as well as notes if applicable, click submit)
5. One Time Itemized Charges
    a. Click Add Itemized Charge
    b. Select Service, Bill to, purchase date, time and notes, then click submit)

Custom Domains

Friday, June 16, 2017 3:18 PM

When adding billing information, please make sure you're adding it properly into SC8. I'm having to correct URLS that were not added properly into the billing area.

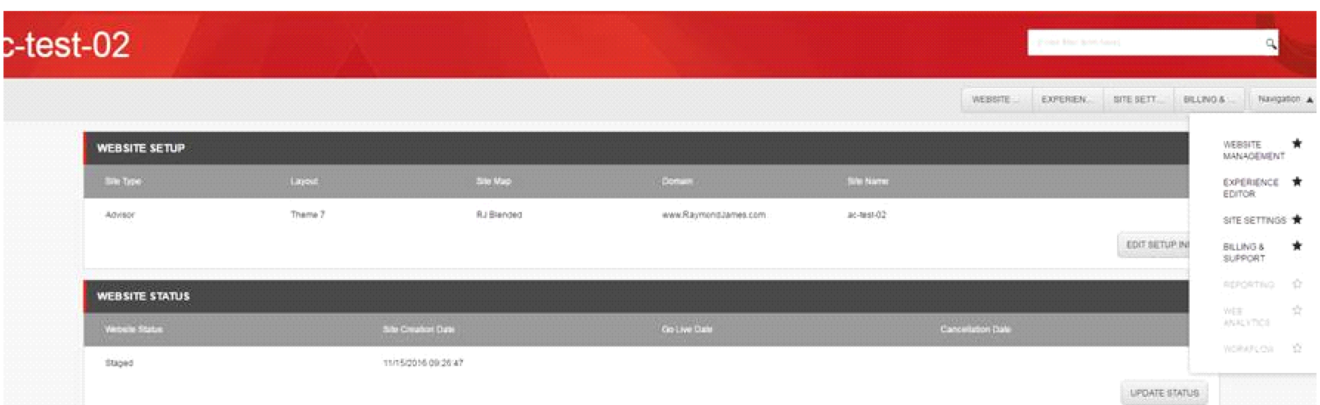
Here are some things to look out for:

1. If we own the domain name, please specify it in the comments area of Trello; as well as the expiration date. If we do not own the domain name, please also specify that by saying, for example: We do not own this domain name, the advisor owns it, expires on 9/10/17. This helps us out so we're not having to WHOIS custom domain names every time if there's a comment on it already in Trello.
2. When adding domain names, before you save the billing information, please add the URL into the notes area for domain billing. If an advisor has more than one domain name and we own it, please add both domain names on separate billing lines with their own expiration dates and URLS into the notes area.
3. If a card says: Bronze-Complimentary, the billing should be: Bronze – RJFS FREE. Billing should never say Waived unless there are notes in the system that say that it's supposed to be waived.
4. Also read the comments to see if there's any additional billing information from Jessica, Beth or someone else. This is rare though.

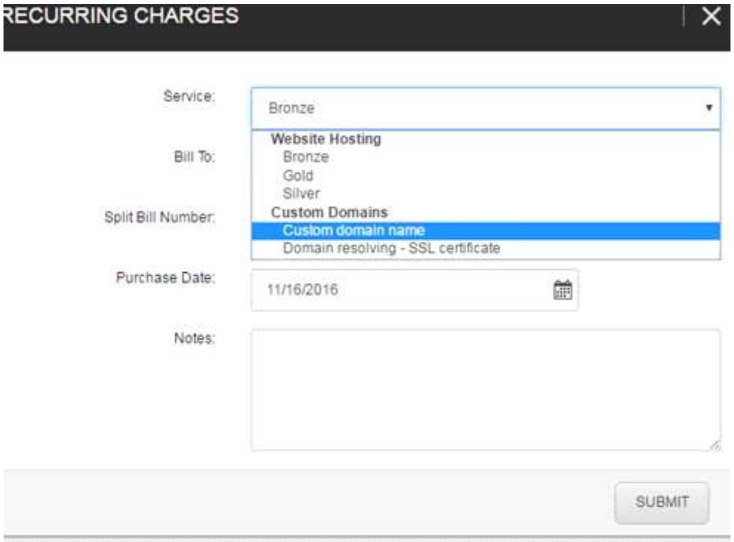
Domain Billing

Keep in mind that items in SC8 are always billed monthly and yearly billing is not supported. In this instance, they would incur an additional 1.67 on top of their maintenance package.

1) Login into the Launchpad
2) Under the Website Management section, select the site
3) Select Billing and Support under the Navigation



4) Click "Add Monthly Charge Item"
5) Under the Service dropdown, select Custom Domain. Using the information from the [Domain Migration](#) spreadsheet, use the purchase date as labeled in SC7. If this date has passed, set it for +1 year.
6)



7) Fill out the bill to information, then hit Submit
8) Scroll down to the end of the page, and hit Save.

Itemized Billing

Monday, January 09, 2017 7:30 AM

[Itemized Charges]

To clarify, domain resolving is not a one-time charge. It's is a cost of $100/yr or $300 for 3 years since we buy the certificates in 3yr increments. You would use the monthly reoccurring entry to bill this.

CS Free

Tuesday, February 07, 2017 10:03 AM

Subject	**CS Free Billing Information**
From	James Hood - Veredus
To	David Faith 53880; Monique Smith; Jennifer Carpenter; Olivier Bizimungu; Beth Burchfield; Jessica Custer
Cc	Dominic Cador
Sent	Tuesday, February 07, 2017 9:50 AM

Good Morning,

We have just released a variation on the migration form, this one specifically to cover Corporate Standard sites, these will be labeled on the form under the support package of "Bronze – Complimentary" to add these into the back end of SC8 you should do the following:

1.) Service to Bronze
2.) Bill to as RJFS Free
3.) Purchase date as typical. (the day you publish the site)

These forms will automatically be entered on Trello, as all other migration forms, the subject line for the email on these forms is:

Advisor Website Migration (CSFREE) Form - group #

If there are any additional questions, please feel free to reach out

Sample Form below:

Domain: **Raymond James**
Approved DBA: **something something**
Existing Site: **2950 Lake Emma Rd # 1000**
Template and Color: **Template 1 - Blue**
Image Theme: **Houston**

Primary Advisor Name: **James**
Primary Advisor Email: **jameshood118@gmail.com**
Primary Advisor FA Number: **123**

Billing Information: **FA Blotter**
Support Package: **Bronze - Complimentary**
Branch Number: **123**
Broker/Dealer Affiliation: **RJA**

Team 1: **people**, - Delegate? - No
Team 2: **people**, - Delegate? - No

Homepage Intro:
Home_A certification of skill - a commitment to serve

Our Approach:
OurApproach_Expertise for the big picture and finer details

What Makes Us Different:
Difference_A collective of expertise dedicated to your financial success

About Raymond James:
About Raymond James_Raymond James: Our dedicated partner

Our Clients:
Business Owners

Services:

Alternative Investments

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Common Issues

Thursday, September 07, 2017 11:34 AM

Duplicated Logo

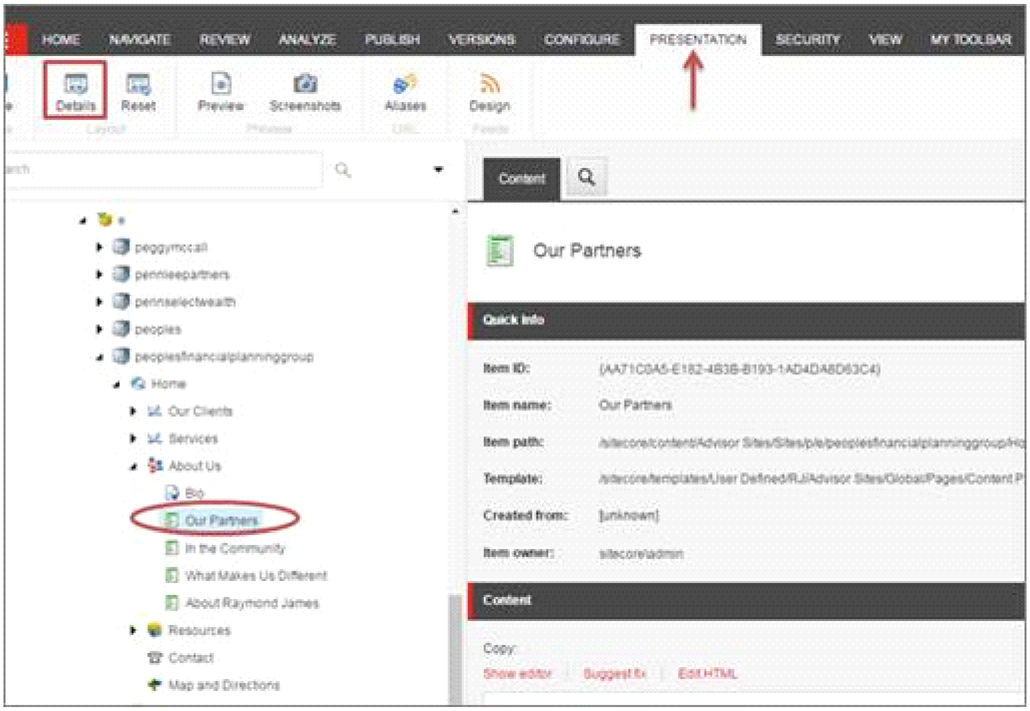
Thursday, September 07, 2017 11:35 AM

Situation: You see two logos stacks on top of each other
Solution: The PageHeader item from final version somehow has become different from the shared layout version. The easiest fix is to remove the PageHeader item from final version and just use the one from shared layout in the presentation details of the home page. This should only effect the home page

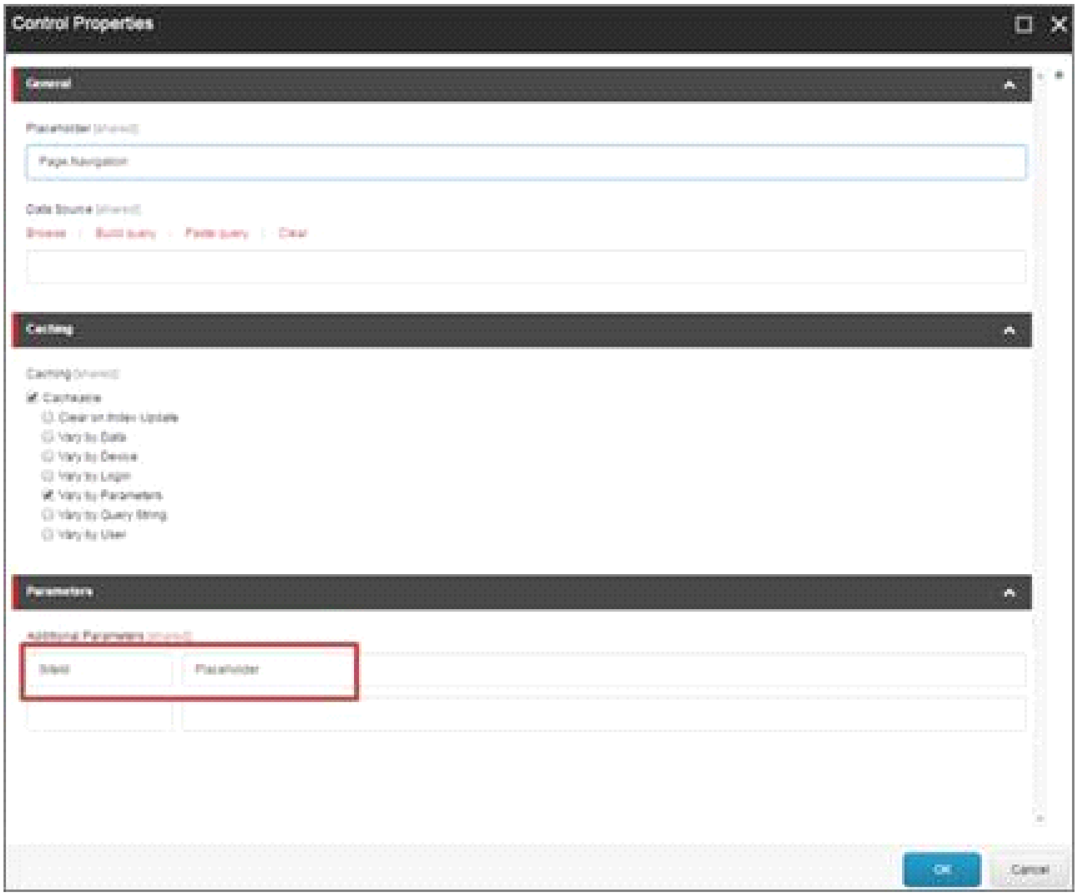
Page Caching Fix

Thursday, May 04, 2017 4:05 PM

1) In the Content Editor, browse to the specific page that's having the problem and select it.
2) Open the page's Presentation Details in the Ribbon via Presentation > Details

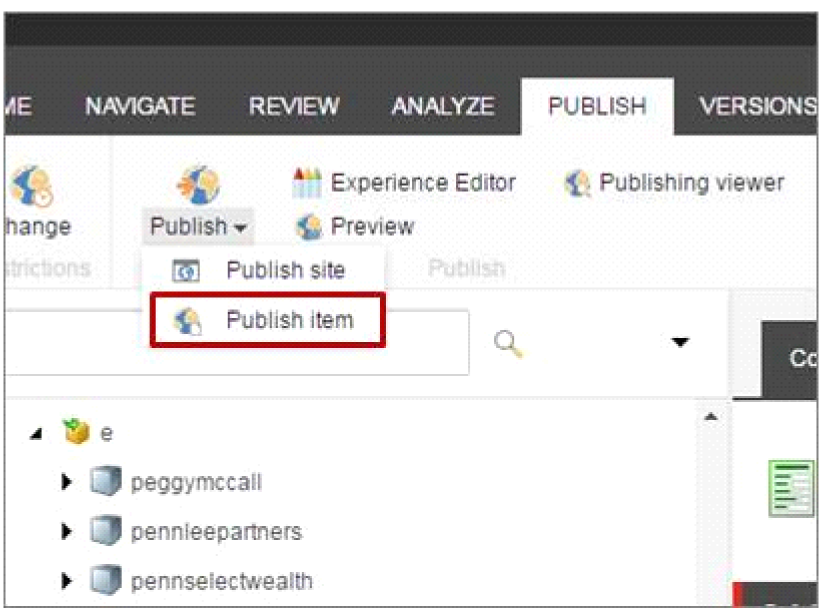


3) Click the "Final Layout" tab and then hit "Edit"
4) Click the "Control" tab and pay attention to these three controls that you will be making the change to
   - **PageNavigation**
   - **PageHeader**
   - **PageFooter**
5) On each of these controls, highlight each and click "Edit"



6) Scroll down the “Parameters” area and under the “Additional Parameters” heading, insert the following values
   - Left Field: **SiteID**
   - Right Field: **SiteID**

7) Click “OK” on all three modals and then publish the item via the ribbon.



Unlocking Items in sites (Advisor Facing)

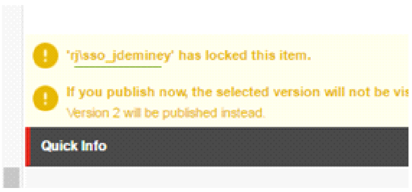
Wednesday, May 31, 2017 9:17 AM

Subject	**RE: Issue: Advisors Locking items in SC8**
From	Olivier Bizimungu
To	James Hood - Veredus; Monique Smith; Jeffrey Zimmerman; Aaron Weiss; Kevin Bishop; John Atkinson; Anthony Arceri
Cc	Dominic Cador; Jennifer Carpenter; Jessica Custer; Beth Burchfield; Dinesh Sharma; Jennifer Schaefer
Sent	Wednesday, May 31, 2017 9:10 AM

Hello team,

As more and more people start using the Experience Editor, these scenarios will occur frequently. I've developed documentation that outlines how FAs and their associates can unlock pages when they need to. You can send the them this document and ask them to follow the instructions.

The best way to tell who has an item locked is to look at the username located at the top of the item to see their last name and connect that with the delegates on the sites.



Let me know if you have any questions.

Thanks,

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: James Hood - Veredus
Sent: Tuesday, May 30, 2017 3:37 PM
To: Olivier Bizimungu; Jennifer Carpenter; Dominic Cador; Monique Smith; Jeffrey Zimmerman; Aaron Weiss; Jessica Custer; Beth Burchfield; Kevin Bishop; John Atkinson; Anthony Arceri
Subject: Issue: Advisors Locking items in SC8

Good Afternoon,

I have noticed an issue in the last week or so of advisors leaving items locked out. This forces us to communicate with the advisors in some way how to unlock said item, so that we can fix whatever it is we are being asked to fix (service now ticket, updates that AM's ask, etc). I have previously seen this on bio items, when I have been asked to update a picture after the site has gone live. Jeff also has been having issues with this as well. What methods do we have for unlocking items?

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Character Counts

Tuesday, October 11, 2016 5:15 PM

Banner Image Header
75 characters including spaces
2 lines max per style guide, but an additional line may be added

Banner Content
550 characters including spaces

Client Niche Tiles
Title
16 characters including spaces
2 lines max
Rollover Copy
104 characters including spaces
4 lines max

Team Tile
Headline
36 characters including spaces
Body
180 characters including spaces

Quote
13-21 words?

Category Tiles
Headline
36 characters including spaces
    14 characters – dominant first line
    22 characters – submissive second line
Body
180 characters including spaces

Designation Formats

Tuesday, April 18, 2017 8:46 AM

CFP:
CERTIFIED FINANCIAL PLANNER™
CFP®

AIF:
AIF®

CRPC:
CRPC®

AAMS:
AAMS®

Image Related Information

Tuesday, January 03, 2017 6:37 AM

Image Dimensions & Templates

Thursday, August 18, 2016 8:39 AM

HOMEPAGE COMPONENTS

- Logo:
  - Logo Guidelines
  - 224 X 22 RJ Default Logo size (Blue Raymond James Logo)
  - 285 x 135 (Desktop theme 1 and 3) (use RGB logo)
  - 285 x 135 (Desktop theme 2) (use white logo if the logo doesn't look good against the background bar)
  - 425 x 84 (Desktop Co-Branded)
  - 260 x 144 (Mobile Co-Branded)
  - Sitecore 8 Desktop Logo Template
  - Sitecore 8 Mobile Logo Template
  - Sitecore 7 Logo Template
- Banners:
  - Homepage banner (large banner component): 1920 x 1150
    - Visible Areas:
      - Theme 1: **1920 x 702**
      - Theme 2: **1903 x 1140**
      - Theme 3: **1920 x 760**
  - Interior pages banner (small banner component): 1920 x 720
    - Visible Areas:
      - Theme 1: **1903 x 550**
      - Theme 2: **1903 x 720**
      - Theme 3: **1920 x 435**
- Team tile: (will take any size images) - auto responsive
  - Ideal size 986 x 390
- Niche/Client Groups tiles: 1170 x 430
- Category/Competency Tiles: 1920 x 900
- Resource Banner Images: 1130 x 350

ABOUT US PAGE COMPONENTS

Bio Tile (AB about us page) and Bio Page Images (same image only):

  - Bio Dimension Update 11/15/2016
    - Bio Image Guidelines
    - 206 X 248 min size, always resize to this size, no smaller, no larger unless specifically asked by advisor
      - Theme 6 MAX SIZE: 273 x 364
    - Cropping Guide

Image Themes

Tuesday, January 03, 2017 6:37 AM

IMAGE THEMES:

- Cities
  - Atlanta
  - Baltimore
  - Birmingham
  - Boston
  - Chicago
  - Dallas
  - Denver
  - Detroit
  - Greenwich
  - Houston
  - Jacksonville
  - Los Angeles
  - Memphis
  - Miami
  - New England
  - New Orleans
  - New York
  - Palm Beach
  - Philadelphia
  - San Francisco
  - Seattle
  - St Louis
  - Tampa
  - Tennessee
  - Washington D.C.
  - Winston Salem
- Regions
  - California Coast
  - Florida Coast
  - Midwest
  - Smokies Appalachian
  - Southwest
- General
  - Business Setting
  - Diverse People
  - Financial
  - Golf
  - Interpersonal
  - Journey
  - Nautical
  - People

Image Theme PDF's

Wednesday, September 13, 2017 12:12 PM

http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Atlanta.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Baltimore.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Birmingham.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Boston.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Business%20Setting.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/California%20Coast.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Chicago.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Dallas.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Denver.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Detroit.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Diverse%20People.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Financial.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Florida%20Coast.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Golf.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Greenwich.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Houston.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Interpersonal.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Jacksonville.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Journey.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Los%20Angeles.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Memphis.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Miami.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/MidWest.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Nautical.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/New%20England.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/New%20Orleans.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/New%20York.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Palm%20Beach.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/People.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Philadelphia.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/San%20Francisco.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Seattle.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Smokies%20Appalachian.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/St%20Louis.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Southwest.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Tampa.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Tennessee.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Washington.pdf
http://www.raymondjames.com/forms/web_marketing_manager/pdf/imagethemes/Winston%20Salem.pdf

Important Processes

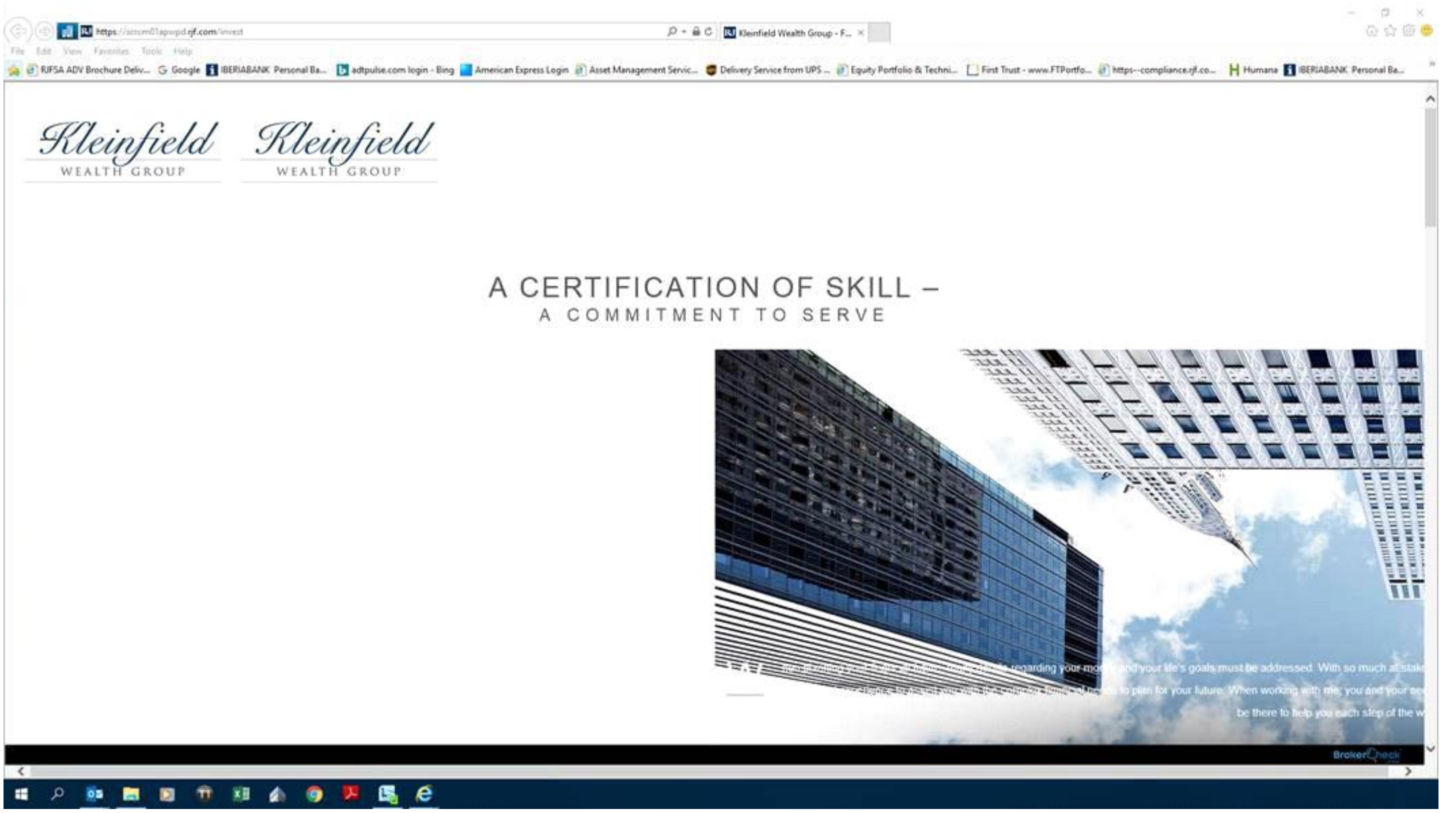
Friday, November 04, 2016 12:40 PM

Troubleshooting Internet Explorer Issues

Monday, September 25, 2017 7:51 AM

[Troubleshooting Internet Explorer Spin Error]()

The following screen grab is an example of what an advisor would see with this error. When an advisor calls or emails saying that their website is broken, or not displaying correctly, please get a screenshot of what they are seeing (a screen share would be the best option, this way you can see exactly what they are doing, and seeing)



Bug Reporting

Monday, December 05, 2016 9:06 AM

SC8 Bug Reporting

-

As you guys start working with SC8 more, you may come across inconstancies either on the front end of the sites or with backed functionality. When you do notice something like this, please ensure the message follows the guidelines below before sending it to me.

- Reproduce the bug on QA to see if you run into the same issue there. If you do, include a note on your report indicating as such, otherwise state that the bug is only on Production.
- Have complete steps on how the bug can be reproduced from start to finish
- Include a screenshot of the bug/failure after reaching the final repro step
- When applicable, include a link and name of the site that you're experiencing the issue on

Example of a bad bug report

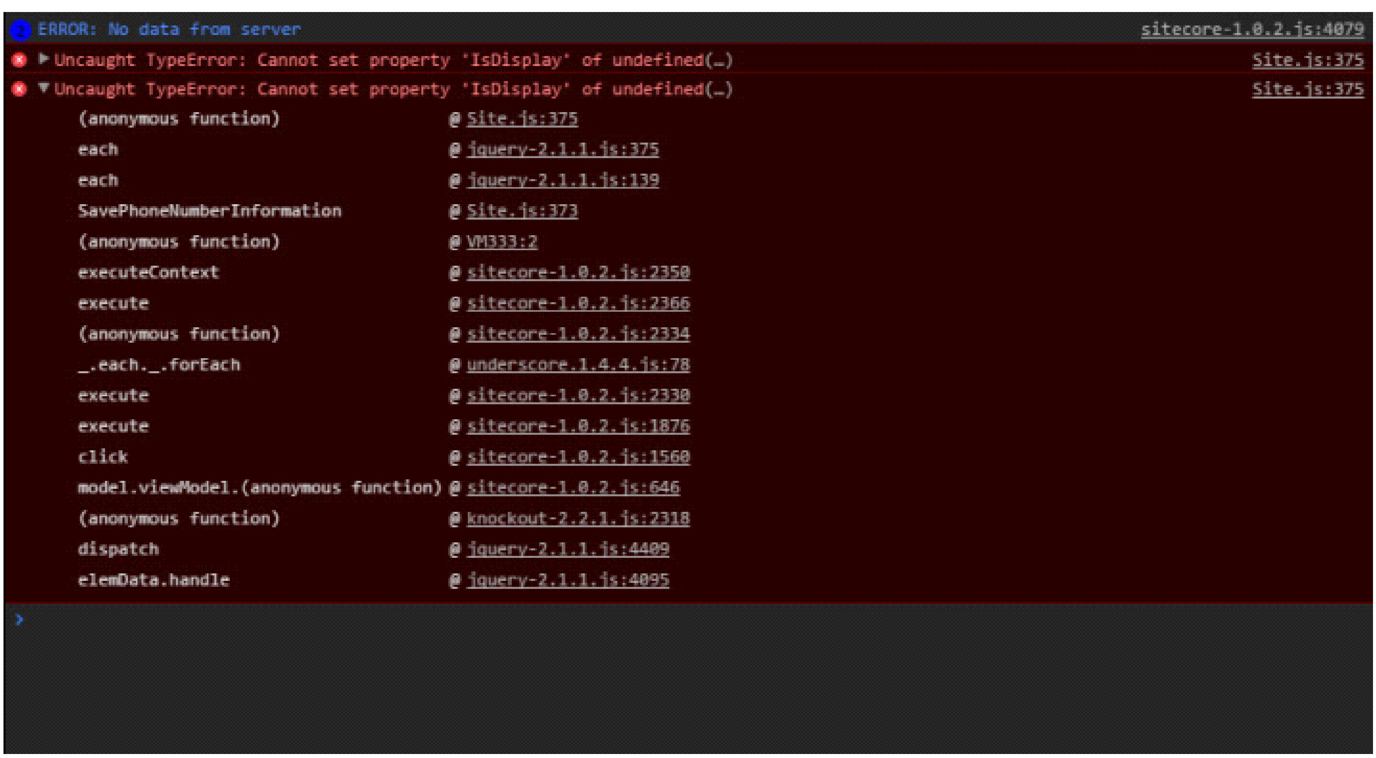
I changed Ron Antipa's name in his bio tile but it's not showing up on his site.

Example of a good bug report

1) From the Launchpad, go to the Website Management panel
2) Select a Website from the list
3) Once under Site Settings, find the Address Information table then click "Edit" under the Phone column
5) In new display window, check *OR* uncheck the "Display" check box.
 >> *BUG* >> When you click "Save" and nothing happens

Tested on sites "AB-blended" and "Ab-Silos"

The error below is displayed in the console.



Below is a list of known issues that we will be addressing soon.

- Resources filter bar is left aligned instead of centered

- TH1 Bio images are displaying to the left of the bio copy instead of the right
- TH2 accordion “Learn More” button is from TH1

Cancelling a site

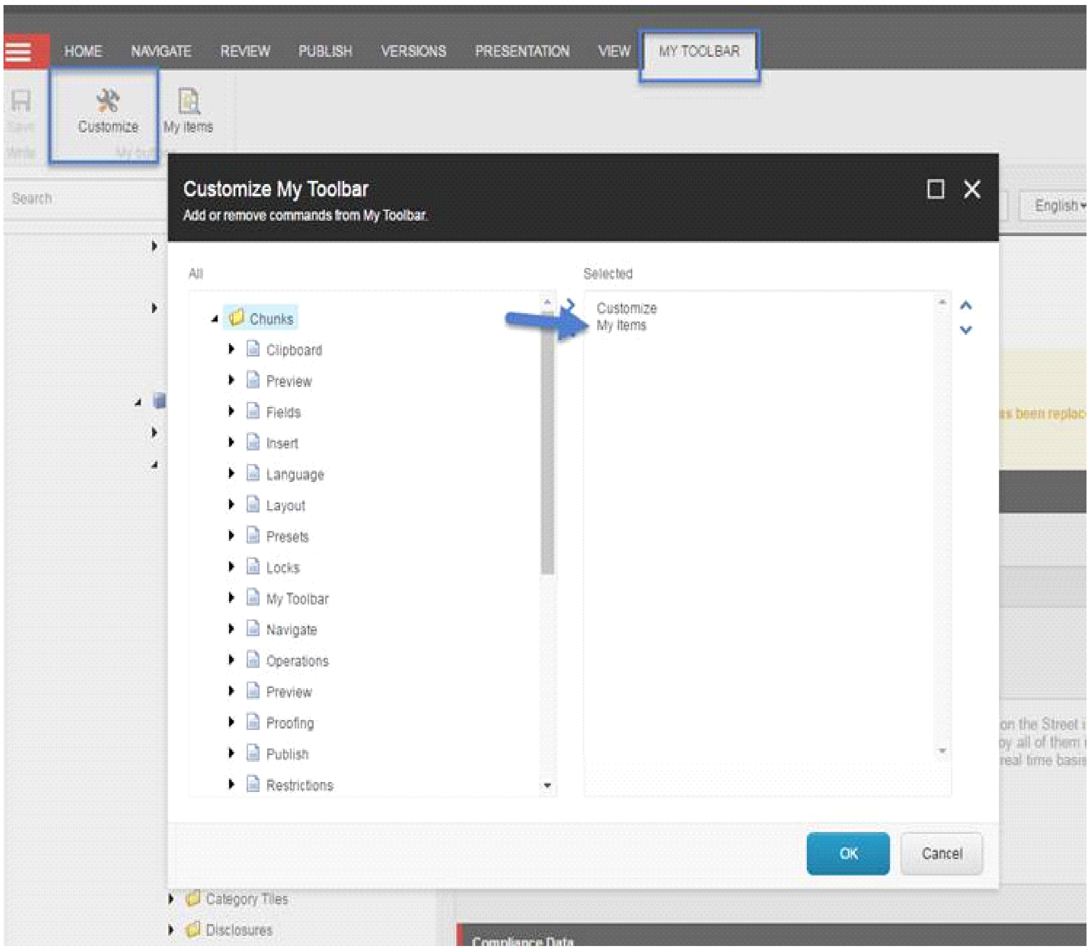
Monday, November 07, 2016 7:39 AM

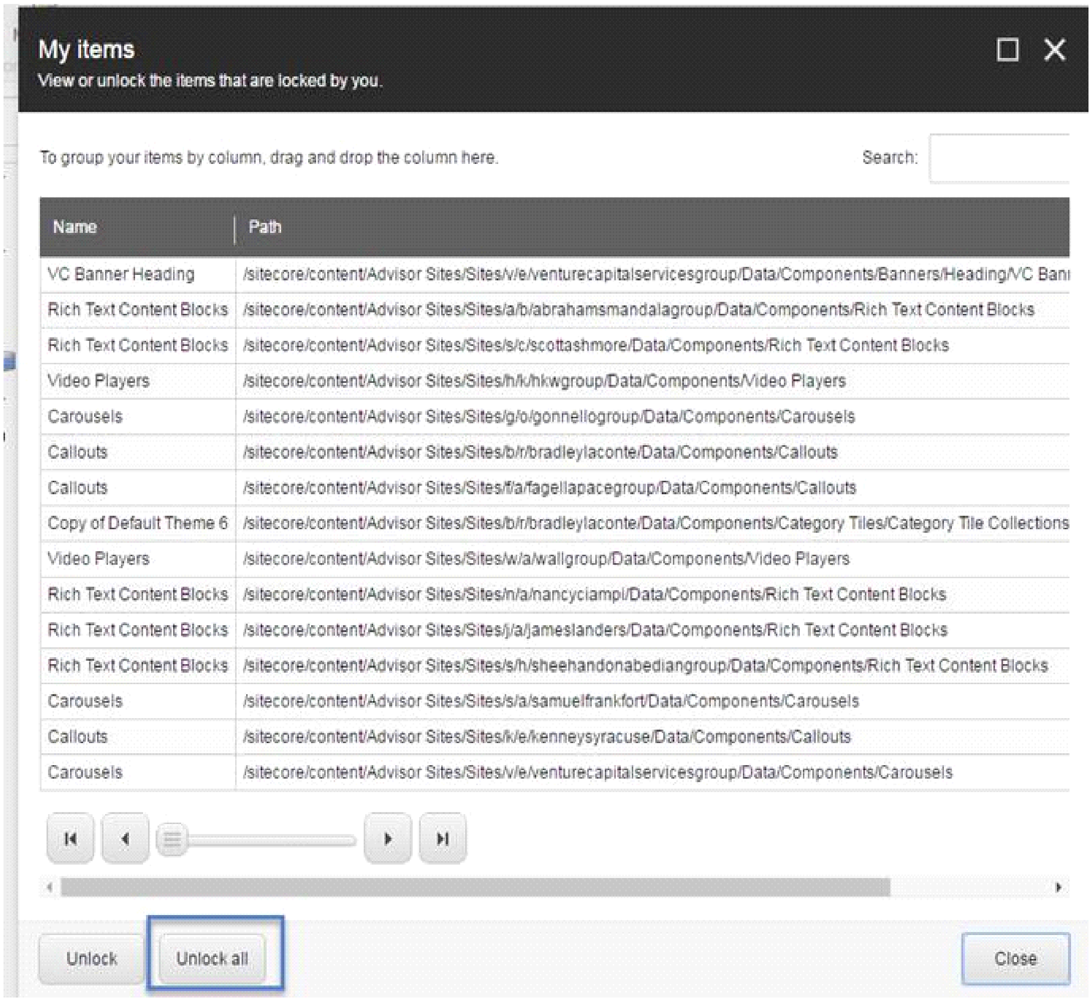
1. Click Website management from the Sitecore 8 dashboard
2. Find your site, click on your site
3. Click update status
4. Change drop down to Cancelled, click submit
5. Click Save, then save and publish

Customize Toolbar

Thursday, October 20, 2016 9:10 AM

One way to unlock all your items is by customizing your toolbar, by adding the 'My Items', then clicking on that and select 'Unlock All.'




My items
View or unlock the items that are locked by you.
To group your items by column, drag and drop the column here.
Search:
Name
Path
VC Banner Heading
/sitecore/content/Advisor Sites/Sites/v/e/venturecapitalservicesgroup/Data/Components/Banners/Heading/VC Ban
Rich Text Content Blocks
/sitecore/content/Advisor Sites/Sites/a/b/abrahamsmandalagroup/Data/Components/Rich Text Content Blocks
Rich Text Content Blocks
/sitecore/content/Advisor Sites/Sites/s/c/scottashmore/Data/Components/Rich Text Content Blocks
Video Players
/sitecore/content/Advisor Sites/Sites/h/k/hkwgroup/Data/Components/Video Players
Carousels
/sitecore/content/Advisor Sites/Sites/g/o/gonnellogroup/Data/Components/Carousels
Callouts
/sitecore/content/Advisor Sites/Sites/b/r/bradleylaconte/Data/Components/Callouts
Callouts
/sitecore/content/Advisor Sites/Sites/f/a/fagellapacegroup/Data/Components/Callouts
Copy of Default Theme 6
/sitecore/content/Advisor Sites/Sites/b/r/bradleylaconte/Data/Components/Category Tiles/Category Tile Collections
Video Players
/sitecore/content/Advisor Sites/Sites/w/a/wallgroup/Data/Components/Video Players
Rich Text Content Blocks
/sitecore/content/Advisor Sites/Sites/n/a/nancyciampi/Data/Components/Rich Text Content Blocks
Rich Text Content Blocks
/sitecore/content/Advisor Sites/Sites/j/a/jameslanders/Data/Components/Rich Text Content Blocks
Rich Text Content Blocks
/sitecore/content/Advisor Sites/Sites/s/h/sheehandonabediangroup/Data/Components/Rich Text Content Blocks
Carousels
/sitecore/content/Advisor Sites/Sites/s/a/samuelfrankfort/Data/Components/Carousels
Callouts
/sitecore/content/Advisor Sites/Sites/k/e/kenneysyracuse/Data/Components/Callouts
Carousels
/sitecore/content/Advisor Sites/Sites/v/e/venturecapitalservicesgroup/Data/Components/Carousels
Unlock
Unlock all
Close

Distinguish Logos

Thursday, April 13, 2017 8:35 AM

These logos are found already in SC8, they can be found in the media library:

Media Library > RJ > Advisor Sites > Global > Distinguish Logos

You will need to add this inline css to fix an issue:

Style="max-height:inherit;max-width:inherit"

Fix: Left Aligned Rich Text component

Wednesday, March 08, 2017 10:39 AM

1. Open the Presentation Details on the About Us page
2. Click Edit
3. Click Controls
4. Click Add
5. Select Content from Page
6. Set placeholder to Page.Body
7. Click Select
8. Move it to above your rich text component (below the intro text and banner component)
9. Change the placeholder on your rich text component to Content.Components
10. Change the presentation Details on the Bio Tile to Content.Components

Media Library Versioning (images)

Thursday, August 11, 2016 4:09 PM

1.) Go to the Media Library (find the site you are working on)
2.) Click lock and Edit
3.) Click Versions from the top ribbon
4.) Click Add (this adds a version)
5.) Scroll down to Media and click detach (ensure you are working on a different version number than 1, upper right hand side)
6.) click attach to upload a new image
7.) Save, Check in

Any item pulling from this image will now pull the new version

Migrating from AB to RJ

Thursday, April 06, 2017 2:43 PM

Before this process can take place properly the site owner must be updated with the new information by registrations, if their CSS information has not been updated you will need to wait until it is.

1. Go into website settings for the site, change the domain to www.raymondjames.com (from www.alex-brown.com)
2. There may be additional items you'll need to update, but these items should be pending changes from CSS, which could take up to 24-48 hours to appear within SC8
   a. These items may be:
      i. Address Label (manually set)
      ii. Disclosures (set by subsidiary based on CSS information of the site owner)
      iii. Logos
3. Change out About Alex Brown page to About Raymond James
4. Ensure Bios do not use AB language for titles
   a. Note this may require a rewrite to the bio, which is probably already in the works, always safe to check

Overriding Columns (add classes)

Thursday, July 28, 2016 7:53 AM

**Currently the additional parameters section of presentation details seems to have no effect on a site

Do not alter any of the additional parameters for SC8 items. These do nothing currently

Rename Site / Sitename Change

Tuesday, October 18, 2016 9:10 AM

DO NOT EVER RENAME A SITE FROM THE CONTENT EDITOR

There are Two methods for renaming, if the first one doesn't work, use the second.

Method 1

1. Click Website Management
2. Find your site
3. Select your site
4. Near the top of the website management screen, click Edit Setup Info
5. Enter New Name, Click Submit
6. Scroll to the bottom, Click Save
7. Click Save and Publish

Method 2

1. Click Website Management
2. Find your site
3. Select your site
4. Near the top of the website management screen, click Edit Setup Info
5. Enter New Name, Click Submit
6. Scroll to the bottom, Click Save
7. Click Save and CONTINUE
8. Go into the content editor
9. Find your site, put SITENAME item into published workflow
10. Select SITENAME item hit publish, publish site
11. Publish Item options: Republish, publish subitems, publish related items

After Sitename Change

1. Change the sitename in that site's Google Analytics property to ensure data continuity.
   a. Change the property name to the new name
   b. Change property settings to match the new url
   c. Change the url in view settings for both all website data and unfiltered
2. Submit a redirect from the old sitename to the new site name in the Redirects & Proxies file.

Remote Meeting Locations

Wednesday, August 02, 2017 11:19 AM

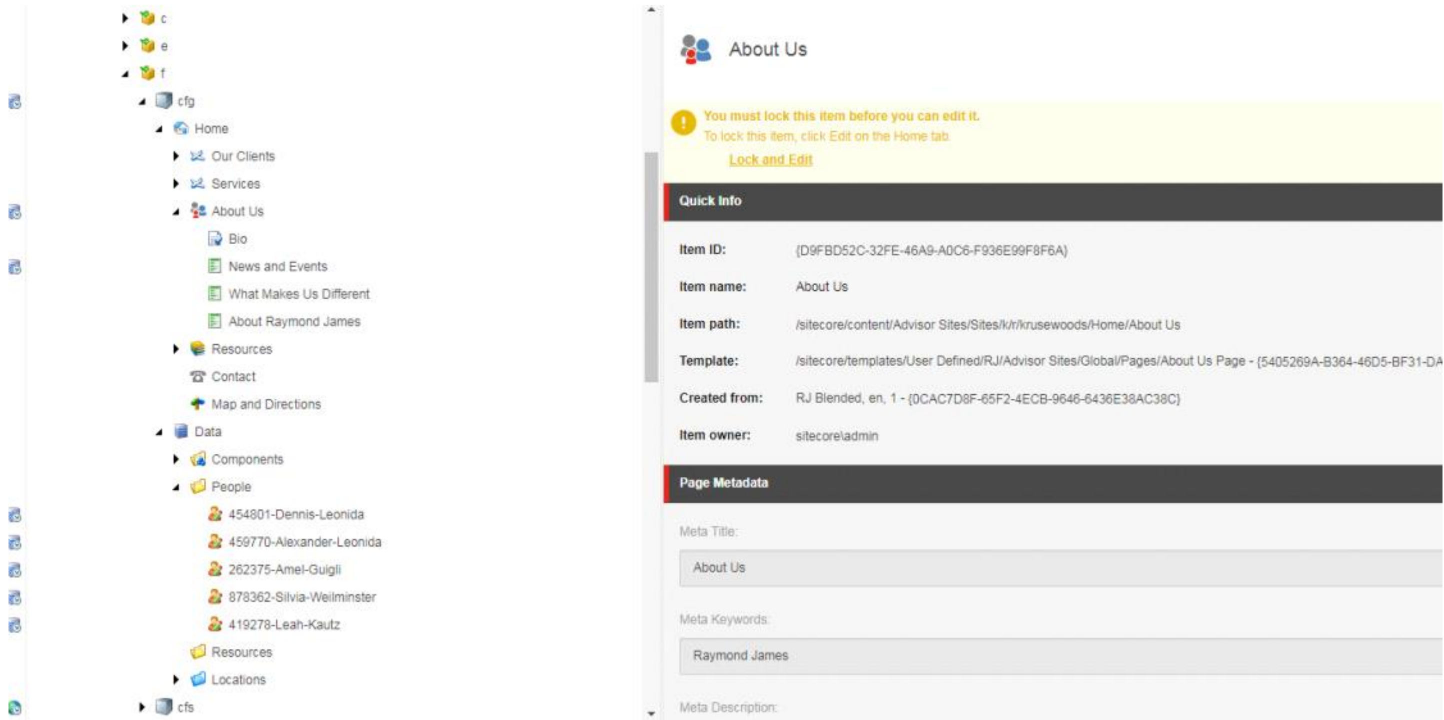
Site	RML Entity Code
https://www.raymondjames.com/howardgoodfriend	4MR02

Show Icons in the Content Editor

Friday, June 09, 2017 1:13 PM

To show the icons in the Content Edit:

1. Right Click the fair left column in the editor
2. Select Locked Items
3. Select Workflow State



Sites with issues publishing to CDN

Thursday, April 27, 2017 7:43 AM

This is a list of sites we have had an issue with in the past. These issues may be corrected, but this serves as a list of all sites we know have had issues.

https://scrcd01apwpd.rjf.com/vanleeuwen
https://scrcd01apwpd.rjf.com/wealthbuilder
https://scrcd01apwpd.rjf.com/mwm
https://scrcd01apwpd.rjf.com/sterlingil
https://scrcd01apwpd.rjf.com/lsa
https://scrcd01apwpd.rjf.com/carlyonfamily
https://scrcd01apwpd.rjf.com/friedmanfinancialpartners
https://scrcd01apwpd.rjf.com/capitalwealthpartners
https://scrcd01apwpd.rjf.com/jpasche
https://scrcd01apwpd.rjf.com/patrickcoyne

Work around to fix sites with this issue

Hey guys,

Here is a workaround you can try for these sites. I've already used it on a few of these sites successfully but give it a try and let me know.

1) In the Wizard, set the site's status from "Live" to "Staged"
2) Save and Publish
3) Change the site's status from "Staged" to "Live"
4) Save and Publish

Thanks,

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Switching Themes/Templates

Friday, May 12, 2017 7:34 AM

Some things may have to change when you switch an advisor site from theme to theme. If they are on theme 1 or theme 3, and they are switching to theme 2, a new logo will have to be uploaded, this would be the white version of their logo, with new size parameters (see Image Dimensions & Templates for full size information and templates).

If an advisor is switching from theme 2 TO theme1/3 then you will need to use the full color version of their logo, at the new size parameters (see Image Dimensions & Templates for full size information and templates).

Web Form Data emails

Tuesday, May 30, 2017 10:07 AM

We are currently storing all of the raw responses from the advisors in at spreadsheet here

Issues Escalation

Monday, September 12, 2016 4:30 PM

Who to notify in the instance of site down/issue with site loading:

1. Initial Point of Contact:
    a. Olivier and team (Aaron, Anthony, Beth, James, Jeff, Jennifer, Jessica)

Pages Advisor have permission to edit

Friday, September 16, 2016 9:59 AM

Advisors have no ability to delete pages they feel they do not need (team recognition, etc)

1. About Us
2. Their Bio Page
    a. Bio
    b. Name
        i. Whether to use informal first name, whether to show middle initial
    c. Social Media Links (twitter/linkedin)
3. What Makes Us Different
4. Team Recognition
5. In the Community
6. Add a new blog

FA Permissions

Monday, December 05, 2016 2:09 PM

James Observations and Testing

FA
Permissio...

Below is what they should be able to edit/change.

HOMEPAGE
- Large banner component: Ability to edit headline and intro (copy to local/update data source and edit)
- Niche and Category tiles:
---> Ability to edit intro text/description
---> Ability to reorder tiles (not add)
- Team tile: Ability to edit header and copy
- Quote:
---> Ability to select from default quote options
---> Ability to add / select custom option (add quotes the same way as other components, by copying down a global quote and editing the copy)

OUR APPROACH: Ability to edit headline, intro text and copy (rich text/accordions)

ABOUT US: Ability to edit intro text

BIO DETAIL: Ability to edit... (will require field-level security)
- Bio copy
- Bio quote
- Titles
- Name
- Designations
- Social media URLs

TEAM SPECIFIC PAGES (In the Community, Accolades/Team Recognitions): Ability to edit headline and copy (Intro and rich text)

RESOURCES: Ability to alter search settings

CONTACT: Ability to edit intro text

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Release Notes

Monday, January 09, 2017 7:28 AM

Release 10/02/2017

Monday, October 02, 2017 1:24 PM

Subject	**10/02/2017 - Sitecore Release Notes**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; James Hood - Veredus; Monique Smith; Kevin Bishop; John Atkinson; Jennifer Schaefer; Jeffrey Zimmerman
Cc	Jessica Custer; Julie Petrilyak; Jennifer Carpenter; Nick Borosh
Sent	Monday, October 02, 2017 1:22 PM

Hello team,

We had a successful release this weekend and below are the small number of items that were included. As a note, the current focus of our development remains on the vanilla extension and that release is tentatively scheduled for the end of this month.

We discussed these items in our team meeting this past week, but if you have any questions on them you can reach out to me. ***The e-mail link mentioned should be included in all our site builds moving forward*****,** with the default value being the designated main contact as indicated on the form. If no main contact is designated, it should be the site's owner.

FEATURES & ENHANCEMENTS

- Added the ability to add external or file links directly into the navigation
- Added the ability to hide navigation links on mobile, desktop, or both
- An e-mail icon link can now be added to the footer of each page, next to the regular social media links

GENERAL BUG FIXES

- Resolved an issue where the social media icons on bio pages for Theme 1 were not opening in a new window
- Resolved an issue that was causing bio pages to not be removed when the person associated with the bio, was terminated by registrations
- Resolved an issue that was causing phone numbers that weren't checked to display, to show up in the mobile version of the navigation

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Content Release 8/17/2017

Thursday, August 17, 2017 8:42 AM

Subject	**Designation Content for SC8**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; Jeffrey Zimmerman; Jessica Custer; Monique Smith; Kevin Bishop; James Hood - Veredus; John Atkinson; Jennifer Schaefer
Cc	Jennifer Carpenter; Nick Borosh
Sent	Thursday, August 17, 2017 8:40 AM

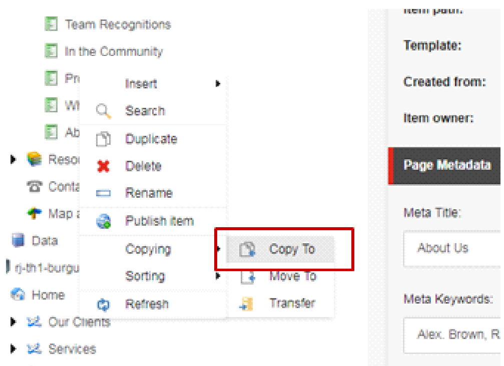
Hello team,

We are rolling out additional content to our SC8 sites that cover the many designations our advisors have. You can find examples of these pages here and here.

One of the pages is designed to be included on sites whose advisors have multiple designations and the other is for those with the just the popular CFP designation.

Instructions

- If the CFP designation is the only one represented on the site, you would include this page.
- If multiple designations are represented, you would include this one. For this page, you have to ensure that only the represented designations are listed. You can do so by going into the page's presentation details, and deleting any of the Rich Text Content Blocks that correlates to a designation that isn't represented on site.
- For existing sites, you can copy the pages as they are from any of the sample sites (rj-th1-blue, rj-th2-burgundy, etc.). Please remember to use the 'Copy To' function instead of 'Duplicate' – which should never be used or 'Move To'.



Additional Notes

- *Moving forward* for the new, transitioning or migration sites these pages should be included as part of the build based on the criteria above. The pages are included in the sitemap so they should be on the sites after you generate them.
- We will be launching a campaign in the near future to alert advisors with SC8 sites who have these designations, but whose sites were built in the past.
- If advisors are requesting this content through ServiceNow or as part of their new site build, because they used to have it on their SC7 sites or they saw it on another site, we should be adding it for them free of charge regardless of their maintenance package. Bronze packages would typically incur a charge here but for the time being, we are waiving the cost until the conclusion of the campaign mentioned above.
- This may not happen often, but if teams with multiple designations prefer to include a combination of the single CFP page and the multiple designations one we can oblige if they make the request.

We can discuss more in the WebServices meeting today but in the meantime, let me know if you have any questions.

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Release 6/24/2017

Monday, June 26, 2017 7:27 AM

Subject	**06/24/2017 - Sitecore Release Notes**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; James Hood - Veredus; Kevin Bishop; Monique Smith; Jessica Custer; Beth Burchfield; Jeffrey Zimmerman; John Atkinson; Jennifer Schaefer; Dinesh Sharma
Cc	Dominic Cador; Jennifer Carpenter; Nick Borosh
Sent	Sunday, June 25, 2017 6:42 PM

Hello team,

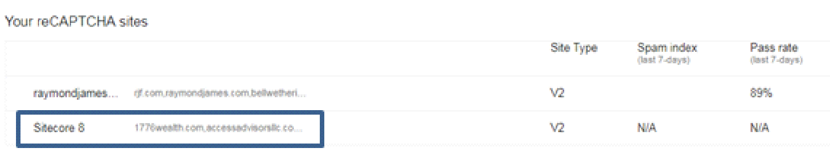
We had a successful release this weekend and below are notes that include everything that was worked on by the development team, and included with this release.

Please reach out if you have any specific questions and don't hesitate to share any feedback or any regression items as you come across them.

Additional Info

1) The issue where sites were not being published to the CD server should be permanently resolved. This applies to the cases where applying the workaround would correct the issue and those where the workaround was ineffective. **If you notice this issue again, or any other issues related to publishing, please let me know as soon as possible.**

2) This doesn't apply to everyone but moving forward when adding a custom domain to Sitecore 8 and you reach the Google Captcha API step, make sure the domain name is added under the newly created Sitecore 8 folder instead of the regular "raymondjames.com" folder.



FEATURES & ENHANCEMENTS

- Added the ability for site visitors to share blog posts via e-mail
- Updated the Google Captcha API key to support additional custom domains
- Added phone numbers to the address area of the Contact page

GENERAL BUG FIXES

- Resolved an issue where some sites were failing to publish to the content delivery server and were inaccessible to visitors
- Resolved an issue where websites with a custom domain could not be previewed because the preview URL was redirecting users to the custom domain
- Resolved an issue where the click area of Theme 3's niche tiles would break if they were displayed as full width
- Resolved an issue where blog pages were deleted if a site with a blog was renamed
- Resolved an issue where users had to publish a website twice before it could be accessed
- Resolved an issue with the Experience Editor where a component related dialog had to be confirmed twice by users
- Resolved an issue with the Experience Editor where editors had difficulty changing copy on Theme 2 bio pages
- Resolved an issue where the suffixes added by users would not display on the bio pages
- Resolved an issue where the Billing and Support page could not be accessed on Internet Explorer 11
- Resolved an issue with Theme 2's Resources page where a mouse scroll button was preventing visitors from loading additional resources
- Resolved an issue where users would receive a 404 error when browsing for a data source to attach to a Related Resources component to
- Resolved an issue where the BrokerCheck link would overflow into the window scroll bar for visitors using Internet Explorer 11
- Resolved an issue where pages placed under the Resources navigation item would produce a layout error
- Resolved an issue where the Resources page filter bar was not displaying as centered on desktop devices
- Resolved an issue where the "Connect with Us" area of Themes 1 & 2 was not properly linking to a site's Contact page
- Resolved an issue where the item name "Home" was displaying in a home page's meta tags
- Resolved an issue where the divider between a logo and a group name would remain despite the absence of a logo

- Resolved an issue where the confirmation text displayed after a form submission was hard to read
- Resolved an issue where the copy on Theme 1's team tile was auto capitalized
- Resolved an issue with Theme 1 & 2 where users were unable to apply bolding to any of the text
- Resolved various padding, color, and styling issues on Theme 3
- Resolved various font style and mobile treatment issues on Theme 2

Release 5/14/2017

Monday, May 15, 2017 7:44 AM

Subject	**05/14/2017 - AdvisorSites Release Notes**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; James Hood - Veredus; Kevin Bishop; Monique Smith; Jessica Custer; Beth Burchfield; Jeffrey Zimmerman; John Atkinson
Cc	Dominic Cador; Jennifer Carpenter
Sent	Sunday, May 14, 2017 4:24 PM

Team,

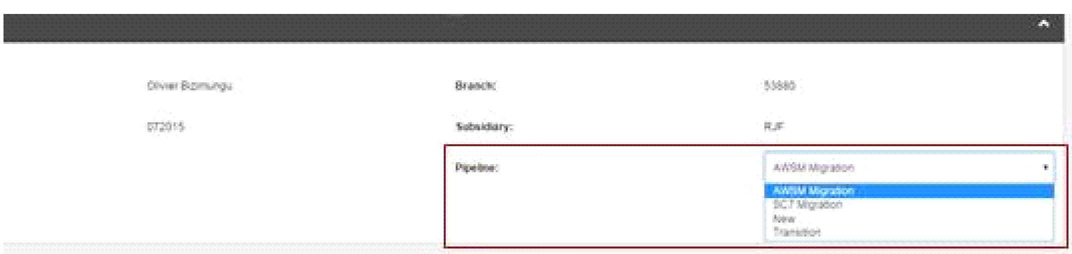
We had a successful release this weekend and below are notes that include everything that was worked on by the development team, and included with this release.

Please reach out if you have any specific questions and don't hesitate to share any feedback or any regression items as you come across them.

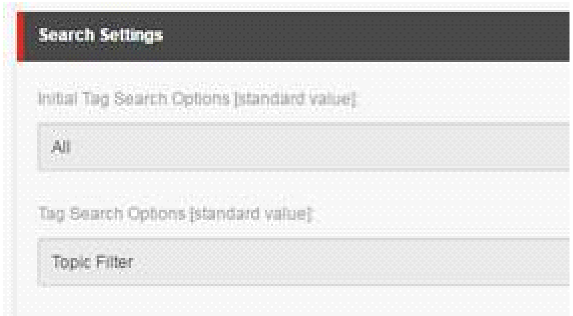
Some additional info:

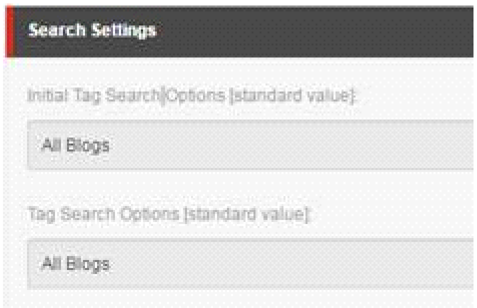
1) We've added additional image sets for advisors to choose from. These are now available on all of the forms along with their contact sheets.
    a. Birmingham
    b. Diverse People
    c. New Orleans
    d. St Louis
    e. Tennessee

2) Moving forward when building a site, make sure to select which pipeline the site belongs to. A dropdown has been added to the Site Settings area of the Website Management panel and it's as simple as selecting one of the available options.

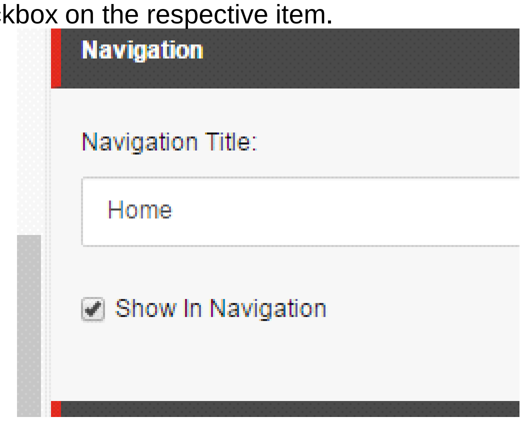


3) You will notice that the resources and blog pages now have two filter options. One is "Initial Tag Search Options" and the other is "Tag Search Options". When creating a new blog, make sure to select "All Blogs" *for both options* and for the Resources pages, they should read "All" and "Topic Filter" respectively.





4) Theme 2's header area has been updated to support larger logos. This means if you use the standard logo from the template, the copy on the bio page will not be covered. This will be the standard size across all of the three themes.
5) Support for adding a home link or hiding a bio page from the navigation has been added. If you are aware of anyone that had requested these options, please go ahead and make the change, time permitting, and reach out to them to let know. It as simple and checking or unchecking the "Show In Navigation" checkbox on the respective item.



6) For the satellite branches, there won't any special processes to display them. Once you add an advisor or associate who is associated with multiple addresses, all of them will now list in the "Address Information" section.

FEATURES & ENHANCEMENTS

- Improved the Experience Editor's load time and general speed
  - Advisors will now have an improved site editing experience after we've worked to improve the EE's performance. The load time was reduced in half and un-need features were removed.
- Updated resources page tags and filtering
  - Advisors are now able to choose which articles can be displayed on their Resources page.

    - This feature also allows advisors as well as our content team to more granularly manage the tags that are displayed in the filter dropdown.

- Added support for satellite branch locations
    - Previously our system did not support adding locations that are satellite offices. This feature introduces those addresses and allows advisors to have all of their registered locations represented on their sites.
    - Developed in collaboration with IT.
- Added automated Meta titles
    - This feature allows systematic Meta titles to be applied to each site that *does not* have custom Meta titles.
    - The Meta titles applied are combination of specific criteria (location, group/advisor name, etc.) already available within the site.
- Added “pipeline” data point
    - For additional tracking and reporting, we’ve added a content managed data point that allows us to identify which pipeline a site belongs to (transitioning, new, etc.).
    - Developed in collaboration with the CRM team.

GENERAL BUG FIXES

- Resolved an issue where advisors’ websites were not immediately listed when they logged in and had to search for it prior to accessing it.
- Resolved an issue where a page’s disclosure paragraph appeared to be outside of the content margins.
- Resolved an issue with Theme 1 & 2’s blue templates where the mobile navigation was the wrong shade.
- Resolved an issue on the blog pages where the heading and copy were not properly aligned with the rest of the page.
- Resolved an issue with the team tile’s click area on Theme 1 & 2.
- Resolved an issue that had disabled the ability to add a “Home” button to a website’s navigation.
- Resolved an issue that had disabled the ability to select which team members are listed in the site’s navigation.
- Resolved an issue with the Theme 3 quote component where the divider displayed improperly.
- Resolved an issue where some Alex.Brown advisors were unable to access the Experience Editor.
- Resolved an issue where Theme 2’s header area overlapped a page’s content if a standard sized logo was added to a site.
- Resolved an issue with the Theme 3 home page banner where the heading animation was aligned too far to the left

Release 3/5/2017

Monday, March 06, 2017 7:21 AM

Subject	**03/05/2017 Advisor Sites Release Notes**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; James Hood - Veredus; Kevin Bishop; Monique Smith; Jessica Custer; Beth Burchfield; Jeffrey Zimmerman
Cc	Dominic Cador; Jennifer Carpenter
Sent	Sunday, March 05, 2017 5:48 PM

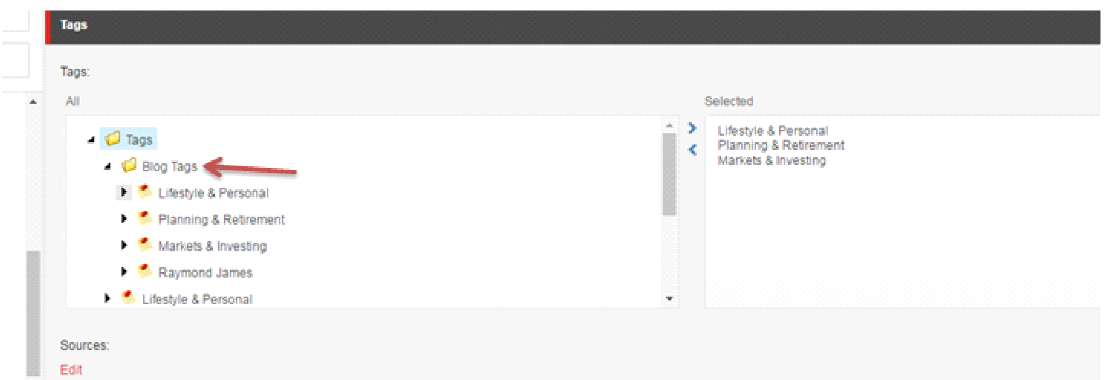
Hello team,

We had a successful release this weekend and below are notes that include everything that was worked on by the development team, and shipped with this release.

Please reach out if you have any specific questions and do not hesitate to share any feedback or regression items as you come across them.

A few touchup notes:

1) When adding blogs moving forward, please make sure you select tags that are located in the “Blog Tags” folder



2) In addition to the document that details how advisors can edit their sites, I’ve put together a short document to help advisors get into the Experience Editor
   a. At this time, advisors should be using IE11 to access the Editor as it’s much quicker. We’re continuing to investigate methods of improving the speed in general.
3) Please make sure you’re billing items correctly. I noticed a number of Website Setup fees that were billed as null because the time value, which is a requirement, was not entered (See documentation for reference) These will need to be adjusted.
4) The logo template has been updated in anticipation of an upcoming release that will standard logo sizes across all templates.
5) Some know issues that are currently on the radar.
   a. Alex-Brown advisors are unable to access their sites through the Experience Editor. The development team is currently looking into this but in the meantime, they should send in their updates
   b. The Theme 3 large banner heading animation is aligned too far to the left

Lastly, thank you all for continuing to provide feedback as well as helping advisors out as we and they transition to this platform.

Features and Enhancements

- Added a “Remember Me” checkbox and some additional links to the Investor Access login area
  - Developed in partnership with the Investor Access team, this feature allows clients to have their login information remembered between sessions in order to reduce the number of clicks for repeat visitors
  - Ships with added security enhancements including disabling auto complete and instituting encrypted username storage and pass through
- Added the ability for advisors to compose blog posts through the Experience Editor
  - Advisors and Delegates can now upload and format their own blogs directly to their websites within a manner of clicks
  - Instructions will be posted to RJnet and shared broadly soon but in the meantime, they can be accessed here.

Theme 3 Bug Fixes

- Fixed an issue on the internal pages Small Banner where the background image used was not centered

- Fixed an issue with the Category Tile's divider line
- Fixed an issue on the iPhone 5 where certain touch motions could break a site's pane
- Fixed a padding and container issue on the "About Us" pages which was causing the copy to appear left aligned
- Fixed an issues where images in Rich Text containers were not responsive on mobile devices using portrait orientation
- Fixed an issue with the address in the footer where it was displayed on multiple lines to allow for better treatment of multiple addresses
- Fixed an issue where the phone and fax numbers were displayed on separate lines to allow for better treatment of multiple addresses
- Fixed an issue where the Media Carousel chevrons were not shown on iPad Pro devices
- Fixed an issue with the Related Resources and Media Carousel headings where they were showing up on two lines and obscuring the cards below them
- Fixed an issue where the copy on the homepage banner would appear cut off due to vertical placement
- Fixed an issue with the click area of the home page Team Tiles
- Fixed an issue on Themes 2 & 3 where the CTA on the Resources card always read "Watch Video" regardless of the type of content
- Fixed an issue on Themes 2 & 3 where the click area for Resources cards did not include the CTA
- Updated the footer to allow for DBA/group names and other address labels
- Updated the hover animation on bio titles to more match the original design

General Bug Fixes

- Fixed an issue where clicking on a Resources page could send the user into a different site from the one they're browsing
- Fixed an issue that was preventing certain sites from being published
- Fixed an issue on Theme 1 where the Facebook icon was not displaying on the bio pages despite containing a valid URL
- Fixed an issue where some domain resolving sites could return server errors after a few requests
- Fixed an issue on Theme 2 where list items located within an Accordion were not styled properly
- Fixed an issue on Theme 2 where CTAs within accordions were not displayed
- Fixed an issue with the Contact page container that caused the intro text to appear misaligned
- Fixed an issue on Theme 2 where the Media Carousel heading was outside it's margins on mobile devices using portrait orientation
- Fixed an issue where the second level navigation items were hard to reach on tablet devices using landscape orientation
- Fixed an issue with the Intro Text component's alignment being broken on certain pages
- Fixed an issue with the form input text on the Contact form where the text was hard to read
- Fixed an issue where blog posts were sometimes showing up on a site's Resources page
- Fixed an issue with the Contact page where the embedded map was not aligned with the rest of the page
- Fixed an issue on Theme 2 where numbering on the Related Resources carousel was skipping digits
- Fixed an issue where the Accordion components were not properly aligned within the internal pages
- Fixed an issue where the captcha on the Contact form was cutoff on iPhone 4 & 5 devices

Release 1/9/2017

Monday, January 09, 2017 7:29 AM

Subject	**This weekend's release**
From	Olivier Bizimungu
To	Anthony Arceri; Aaron Weiss; Beth Burchfield; Jessica Custer; Dominic Cador; James Hood - Veredus; Monique Smith; David Faith 53880; Jeffrey Zimmerman
Cc	Jennifer Carpenter
Sent	Sunday, January 08, 2017 5:15 PM

Hello team,

Our release this weekend was successful and we can now start publishing sites as they're built. In addition, Theme 3 is now available to advisors along with the ability to add blogs to the sites.

With RJ sites rolling out, I also took the time to document the correct steps to take when billing itemized charges. I recommend everyone review the document to familiarize themselves with the idiosyncrasies of the system.

Although we did as much testing as possible through development and post-deployment, it's possible there could be a few things out there that were missed. If you do notice anything, please follow the steps outlined here in reporting the issue and send them to me.

Know Issues

- Contact page container is misaligned across all three themes.
- Theme 3 small banner positioning is off after the animation is finished. I developed a temporary fix for this until we can address it, so please see me if you need to publish a theme 3 site.
- Advisors cannot add their own blogs via the Experience Editor.
- Caching issues on the resources page

As always, let me know if you have any questions.

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Release 11/20/2016

Monday, November 21, 2016 12:25 PM

Subject	**SiteCore 8 Release**
From	Olivier Bizimungu
To	Aaron Weiss; Anthony Arceri; Jessica Custer; Beth Burchfield; Jeffrey Zimmerman; James Hood - Veredus; Whitney Bell - Skybridge
Cc	Jennifer Carpenter; Dominic Cador; Hannah Fazio
Sent	Sunday, November 20, 2016 4:56 PM

Hello team,

This weekend's launch was completed successfully and we're now poised to start building, and shortly enough, publishing RJ advisor's sites on SiteCore8. Following the milestone, I'd like to take the opportunity to address a few things.

Proxy

All our environments (AWSM, SC7, and Custom) are now sharing a common layer in that they are all accessed through a proxy. The result for us and our clients is that the URLS and paths for these sites should not be changing and they should continue to operate as normal. We did a lot of testing to make sure these sites would not be interrupted but it's impossible to capture everything across 3000+ sites. You may receive some reports from the branches regarding broken links, videos, scripts, etc on their sites over the next few days. If you do, please have them follow the regular process of submitting a ticket so we can look into it. If you receive a note that a website is no longer working, one way to check and see if it's an issue with the proxy is to first try accessing the site via the Public server URL below by replacing the "testolivier" the equivalent rj.com/**advisorURL**. If this is the case, shoot me a message and I will take a look.

http://publc05wbwpd/**testolivier/**

SC8 General Items

Experience is the best teacher so it's still recommended that if you haven't gotten much exposure to the system yet, that you try to set some time aside to do so on a frequent basis. In addition to our growing documentation, below are a few items to keep in mind as you do

- If you're not sure if a feature or a functionality that is requested by a client is possible, please let me know so I can provide some direction. This also means **before placing an override (CSS or JS) on an individual site, you must communicate it to me.** As most of you are aware, we ran into issues with SC7 where the lines of what was and wasn't possible were blurred and we ended up accommodating a lot of things that would have been better served through the agency. Not only does this put an undue strain on the team but it also diminishes feature scalability by introducing variables that aren't planned and can't be accounted for.
- With migration already underway, it's important to remember that no two sites within SC8 can share the same name. This means for new and transitioning site requests, we must ensure that the rj.com address isn't already taken before confirming it's availability to the client.
- One of the changes we made to the components this release was the standardization of the Intro Text Content Component. This means there should no longer be ambiguity on what wrapper tag should be used on these to ensure proper formatting. **The result is that these must always be wrapped around a <p> tag.** At this point, ***if you had added any custom intro texts to a site, please go back and add these***

***tags to ensure conformity*.** I went in and fixed the Global intros so those should be fine.

- We've renamed the theme names on production to simply read Theme 1 and Theme 2. Moving forward, we can refer to these as such internally and to clients.

SC8 Workbox

Unlike SC7, I would like to see us take better care of the workbox for SC8 so we can reduce clutter, improve our process for approving FA changes, and make compliance's job easier. You should take time each week to review the draft and pending publish queue to see if there anything in your name that needs clearing out. As I stated during training, the best approach to combat this is to leave your items in the Published state while you're working on them but not lock them so you can edit as necessary. Then when you're finished making the change, you can lock them.

SC8 Bug Reporting

As you guys start working with SC8 more, you may come across inconstancies either on the front end of the sites or with backed functionality. When you do notice something like this, please ensure the message follows the guidelines below before sending it to me.

- Reproduce the bug on QA to see if you run into the same issue there. If you do, include a note on your report indicating as such, otherwise state that the bug is only on Production.
- Have complete steps on how the bug can be reproduced from start to finish
- Include a screenshot of the bug/failure after reaching the final repro step
- When applicable, include a link and name of the site that you're experiencing the issue on

Example of a bad bug report

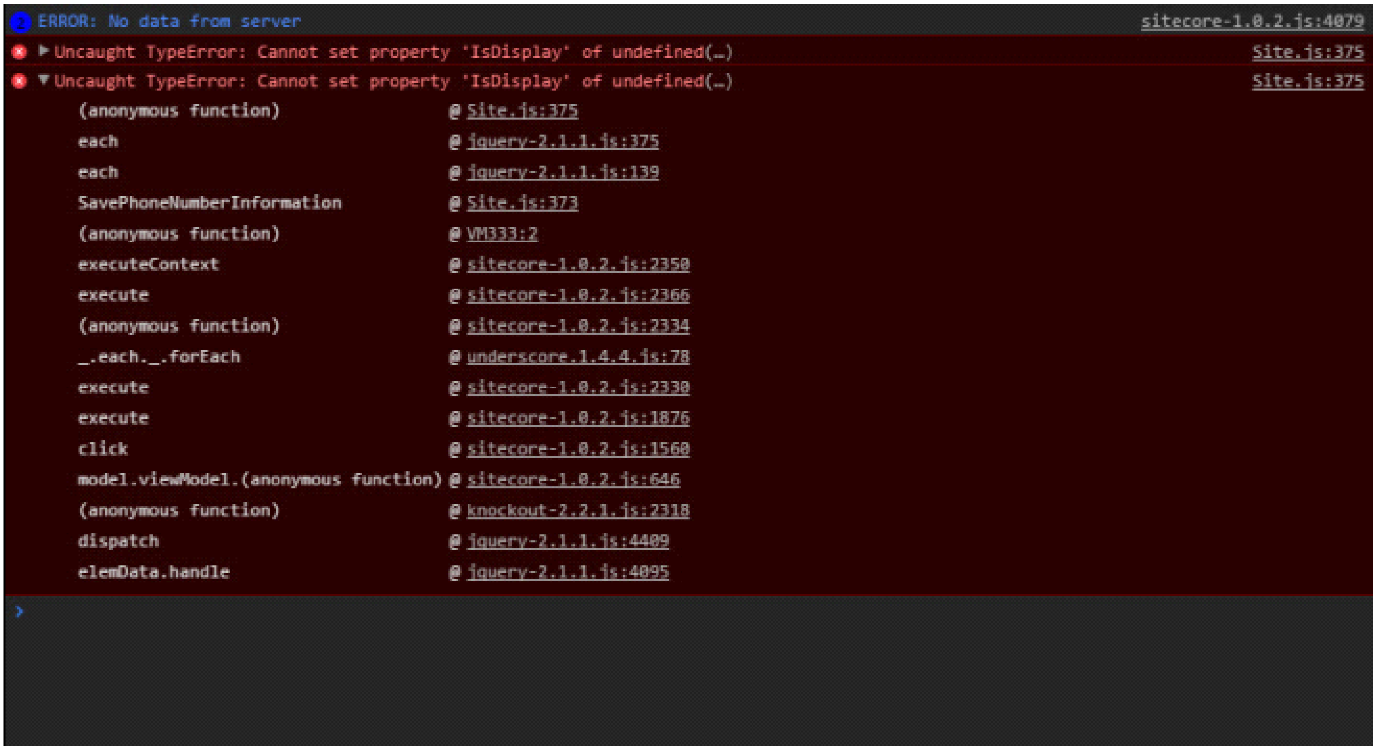
I changed Ron Antipa's name in his bio tile but it's not showing up on his site.

Example of a good bug report

1) From the Launchpad, go to the Website Management panel
2) Select a Website from the list
3) Once under Site Settings, find the Address Information table then click "Edit" under the Phone column
5) In new display window, check *OR* uncheck the "Display" check box.
 >> *BUG* >> When you click "Save" and nothing happens

Tested on sites "AB-blended" and "Ab-Silos"

The error below is displayed in the console.



Below is a list of known issues that we will be addressing soon.

- Resources filter bar is left aligned instead of centered
- TH1 Bio images are displaying to the left of the bio copy instead of the right
- TH2 accordion “Learn More” button is from TH1

Thanks,

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Meeting Notes and Emails

Wednesday, July 12, 2017 10:21 AM

Meeting Notes 7/12/2017 Custom Banners Meetings

Wednesday, July 12, 2017 10:21 AM

Hey guys, just had a meeting with Olivier about custom banners and custom pages for SC8, here are my short notes. I have made the notations on your cards, but lets make sure that we're all working towards getting this correct from now on. Additionally Olivier will call a meeting possibly Friday to go over custom pages/content

This email will be added to the one note, for referencing.

OneNote Usage:

Remember, we use one note for a reason, please remember to check it for information

Questions on Custom Content:

If there are questions on custom content and how it should be formatted, where it should go, and how it should overall look, please email Olivier and me so that we can get together and get you an answer, we want to be sure that we are sending out correct and intact sites. If you have questions, please ask them.

Expanded:

Do not use images on blog page banners, only headline, the word "Blog" appearing is a bug (this goes for resource pages too, no banner images)

Bold content:

Do not use inline CSS to fix anything, write semantically correct html including the strong tags around the content that should be bolded, there is currently a bug in css that is overriding all tags under intro_copy. It has been reported and Olivier will be addressing this. I repeat do not use inline CSS to override. It would be better to have the correct html in place so that the CSS fix will correct the issue.

Intro Text Vs Rich Text:

99.9% of the time we should be using intro text components, the only time we should be using rich text components over intro's is when we have no other choice, or when the content demands it.

Context:

We need to be going through the content on these pages, we cannot just assume that the custom content as is from SC7 was in the correct place 100% of the time, every time we build a site we must decide where to place content, we do this by figuring out the context from the content, what are they trying to say, is this a service they are offering, a client type they support, or something about their firm? There will never be a blanket rule that always determines where we always place content, other than to say "Context is will decide"

Banners:

All custom pages come with a default smaller banner (do not change the place holder, this should always be set to Page.Components, do not override this with Content.Components), all custom pages should have a banner component, but not all pages will have an image. Pages on SC7 that have a lead in image will likely be outliers, they probably will not come up that often, but we need to be mindful about how to approach these pages. When we have these pages, remove the banner image from the banner (by selecting nothing in the banner component for banner image). Again this will likely not be that often, but we need to make sure we have these nailed down.

On the Heritage site that Kevin is working on there are a number of pages that have a lead in image (the picture of the ladies on the home page for example) For these you would take off the image from the banner, and just use the lead in image as a "banner" (Olivier will provide more insight into this, as there was no clarification what he meant by "All custom pages should have a banner", IE, did he mean all custom pages should have a banner COMPONENT, or "All custom pages should include some sort of lead in image regardless of component" In this case we know that their images are not the appropriate size for ACTUAL banners in SC8, so we will use them as lead in images within a rich text component or intro text component.

Banners for Blog and Resources pages:

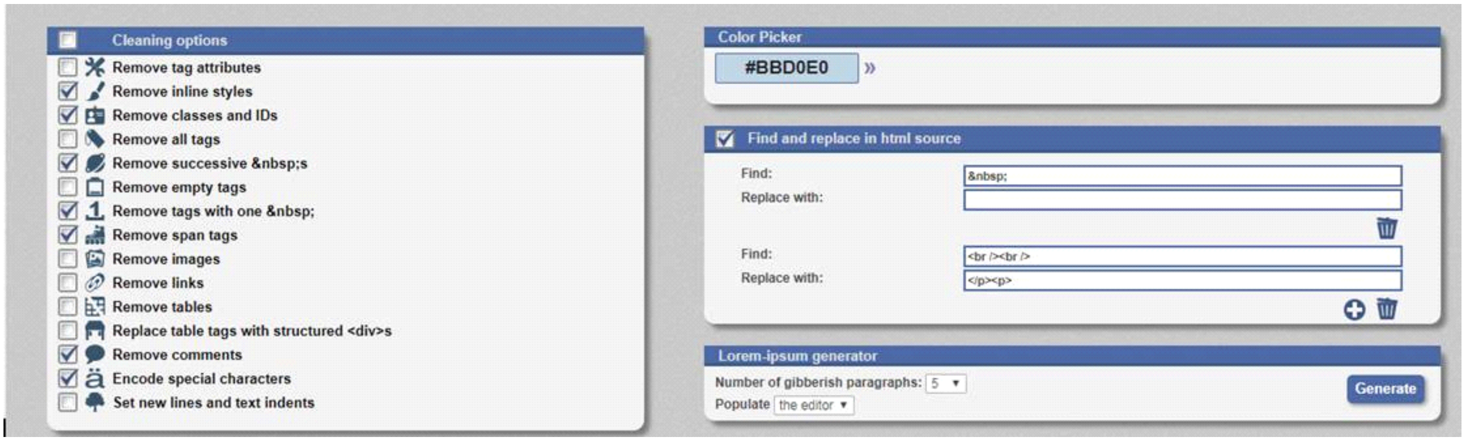
Blog pages shouldn't have an image on the top, the word "Blog" on the page is a bug, Blog and resources pages should never have an image in the banner.

HTML Cleaner:

We use html cleaner to strip out bad html and produce clean html, this will require you to adjust the settings on the page, but will also usually add an ad link to the bottom of the html, these should always be removed.

1. Use www.html-cleaner.com to clean up any HTML migrated from any site
2. Do not add additional inline styles
3. Use clean html, do not use nested code unless it is semantic
4. Use the following settings:
   a. Find:
   b. Replace: (press space bar in the field)
   c. Find:

   d. Replace: </p><p>



Formatting:
We should be attempting to format the SC8 pages to be as close to the SC7 pages as possible, this includes centering content, or aligning it in the same way it was on SC7. We want to be sure that how the advisor expects to see the page is how they see it

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Sample Sites

Tuesday, January 03, 2017 4:35 PM

RJ:
https://www.raymondjames.com/rj-th1-blue/
https://www.raymondjames.com/rj-th1-burgundy/
https://www.raymondjames.com/rj-th1-greygold/
https://www.raymondjames.com/rj-th2-blue/
https://www.raymondjames.com/rj-th2-burgundy/
https://www.raymondjames.com/rj-th2-greygold/
https://www.raymondjames.com/rj-th3-blue/
https://www.raymondjames.com/rj-th3-burgundy/
https://www.raymondjames.com/rj-th3-greygold/

AB:
https://scrcm01apwpd.rjf.com/ab-blended
https://scrcm01apwpd.rjf.com/ab-silos

Sites with Specific Types of Content

Thursday, February 23, 2017 10:06 AM

Blogs:
https://www.raymondjames.com/hesmerwealth
https://goqcig.com
https://www.raymondjames.com/rule2advisors

Custom Banners:
http://www.cornerstonefp.com

Custom Niche Tiles:
http://www.cornerstonefp.com

Custom Category Tiles:
http://www.cornerstonefp.com

Custom Newsletters and other PDF's

Example with Accordion Style:
https://www.raymondjames.com/stonebridge/resources/newsletters

Photo Gallery: (hand coded)
https://www.raymondjames.com/carolyncaffee/about-us/photo-gallery
https://www.raymondjames.com/roysachs/about-us/in-the-community

RJ Theme 1 with larger bio pics:
https://www.raymondjames.com/louisdagen

Tab Examples:
https://www.raymondjames.com/silvermangroup/businesses-and-institutions/services

tabs and callouts:
https://www.alex-brown.com/venturecapitalservicesgroup/our-clients (venture capital actually has these pages hidden from their nav, don't know why)

Our Partners Pages:
https://www.raymondjames.com/silvermangroup/about-us/our-partners
https://www.raymondjames.com/lisabordelon/about-us/our-partners
https://www.raymondjames.com/westwealthmanagement/about-us/our-partners
https://www.raymondjames.com/dennislulay/about-us/our-partners
https://www.raymondjames.com/joshwaymire/about-us/our-partners
https://www.raymondjames.com/seanhoolihan/about-us/our-partners

Videos:
https://www.raymondjames.com/connorfinancial

Video (Single and Playlist):
https://www.raymondjames.com/barrystern/videos-and-publications

Divorce Service page:

https://www.raymondjames.com/oakswealthpartners/services/services/divorce-financial-planning
https://www.raymondjames.com/cookdanielwm/divorce-planning

SiteCore 8 One Pager

Monday, September 19, 2016 4:50 PM

Sitecore8_1PagerFinal

Subsidiary Disclaimers

Tuesday, March 21, 2017 8:00 AM

(Back up only, to have correct formatting if we have to copy something in)

RJFS:

<p>Raymond James financial advisors may only conduct business with residents of the states and/or jurisdictions for which they are properly registered. Therefore, a response to a request for information may be delayed. Please note that not all of the investments and services mentioned are available in every state. Investors outside of the United States are subject to securities and tax regulations within their applicable jurisdictions that are not addressed on this site. Contact your local Raymond James office for information and availability.

Links are being provided for information purposes only. Raymond James is not affiliated with and does not endorse, authorize or sponsor any of the listed websites or their respective sponsors. Raymond James is not responsible for the content of any website or the collection or use of information regarding any website's users and/or members.

© 2017 Securities offered through Raymond James Financial Services, Inc., Member FINRA / SIPC | Privacy Policy | Terms of Use</p>
<p>Investment advisory services offered through Raymond James Financial Services Advisors, Inc.</p>

RJA:

Raymond James financial advisors may only conduct business with residents of the states and/or jurisdictions for which they are properly registered. Therefore, a response to a request for information may be delayed. Please note that not all of the investments and services mentioned are available in every state. Investors outside of the United States are subject to securities and tax regulations within their applicable jurisdictions that are not addressed on this site. Contact our office for information and availability.

Links are being provided for information purposes only. Raymond James is not affiliated with and does not endorse, authorize or sponsor any of the listed websites or their respective sponsors. Raymond James is not responsible for the content of any website or the collection or use of information regarding any website's users and/or members.

© 2017 Raymond James & Associates, Inc., member New York Stock Exchange / SIPC | Privacy Policy | Terms of Use

Site Section Information

Friday, September 01, 2017 9:31 AM

Bio Pages

Friday, September 09, 2016 12:33 PM

~~**Situation:** theme 7 bio page content does not line up with the images.~~
~~**Workaround:** Adding a margin-top: -35px fixes alignment issue on theme 7 bio pages~~
~~**Prevention:** Developers can fix the layout for this page.~~

This has been fixed on production, confirmed 10/18/16

Situation: Designations appear to use html entities within the content editor.
Workaround: this is just a display bug in the editor itself, the designations will display properly
Prevention: Developers could fix this field in the content editor so that it doesn't try to encode html as html entities

Advisor Images: Cropping Guide

Tuesday, May 02, 2017 7:48 AM

Bio Quote

Wednesday, July 12, 2017 11:26 AM

This should only be plain text, no html, no quotes.

Designation Pages

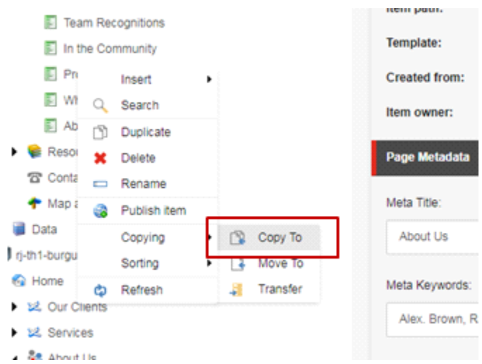
Thursday, August 17, 2017 12:28 PM

We are rolling out additional content to our SC8 sites that cover the many designations our advisors have. You can find examples of these pages [here]() and [here]().

One of the pages is designed to be included on sites whose advisors have multiple designations and the other is for those with the just the popular CFP designation.

Instructions

- If the CFP designation is the only one represented on the site, you would include this page.
- If multiple designations are represented, you would include this one. For this page, you have to ensure that only the represented designations are listed. You can do so by going into the page's presentation details, and deleting any of the Rich Text Content Blocks that correlates to a designation that isn't represented on site.
- For existing sites, you can copy the pages as they are from any of the sample sites (rj-th1-blue, rj-th2-burgundy, etc.). Please remember to use the 'Copy To' function instead of 'Duplicate' – which should never be used or 'Move To'.



Additional Notes

- *Moving forward* for the new, transitioning or migration sites these pages should be included as part of the build based on the criteria above. The pages are included in the sitemap so they should be on the sites after you generate them.
- We will be launching a campaign in the near future to alert advisors with SC8 sites who have these designations, but whose sites were built in the past.
- If advisors are requesting this content through ServiceNow or as part of their new site build, because they used to have it on their SC7 sites or they saw it on another site, we should be adding it for them free of charge regardless of their maintenance package. Bronze packages would typically incur a charge here but for the time being, we are waiving the cost until the conclusion of the campaign mentioned above.
- This may not happen often, but if teams with multiple designations prefer to include a combination of the single CFP page and the multiple designations one we can oblige if they make the request.

Full Page Bio

Monday, April 03, 2017 3:32 PM

Use this for Home Office people, or for anyone who cannot be added to the system and should still be on a site

The following HTML can be used:

```
<div class="container">
   <div class="row">
      <div class="col-xs-4">
         <p>Name, Designation1, Designation2, Designation3</p>
         <p>Title1, Title2</p>
      </div>
      <div class="col-xs-8">
         <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas id ullamcorper neque. Integer nec ultricies metus. Cras congue eros dictum ante pellentesque, at tincidunt neque facilisis. Morbi ultrices lorem quam, ut finibus neque blandit elementum. Nulla justo ipsum, congue a mauris et, consectetur hendrerit tellus. Maecenas quis diam vitae magna rutrum elementum. Pellentesque vulputate mi a pulvinar vulputate. Vestibulum egestas magna ipsum, non rutrum neque tempus eu. Praesent pellentesque vulputate arcu, eu elementum justo consequat sit amet.</p>
         <p>Suspendisse nec imperdiet sem. Phasellus at tellus at neque ultricies laoreet id a est. Praesent fringilla risus odio, vulputate auctor odio tincidunt eget. Donec eu justo vel magna cursus ornare. Donec tempor convallis rutrum. Donec cursus ut turpis at consectetur. Etiam lacinia metus quis rhoncus euismod. Etiam luctus nisl nunc, eu pellentesque dui posuere nec.</p>
         <p>Aliquam at augue nec arcu fermentum sodales ut sit amet lectus. Suspendisse faucibus dolor non metus ultricies iaculis. Nam interdum augue imperdiet odio volutpat, at euismod ligula euismod. Proin quis tortor sodales, rhoncus neque ac, tincidunt turpis. Etiam dapibus lorem non felis finibus efficitur. Phasellus ut justo ut nisl tristique elementum id ac elit. Sed consectetur, ligula ut vulputate auctor, dolor nisl semper ligula, at vulputate arcu ex in risus. Nam sagittis sed augue at imperdiet. Maecenas malesuada ornare nibh a tempor. Vestibulum quis sodales ligula. Morbi nec dapibus metus. Vivamus augue leo, laoreet quis nulla bibendum, interdum molestie dolor. Vestibulum quis tincidunt quam. Cras mattis scelerisque ex in tincidunt. Duis lacus justo, sollicitudin faucibus dui ac, venenatis volutpat enim. Duis nec leo egestas, volutpat turpis eu, posuere libero.</p>
      </div>
   </div>
</div>
```

Issue: Accessing Bio Page for 3 Name Person

Thursday, July 21, 2016 3:42 PM

*This is for getting to bio pages within the experience editor for FA/CA's that have their profile setup using something other than first name last name.

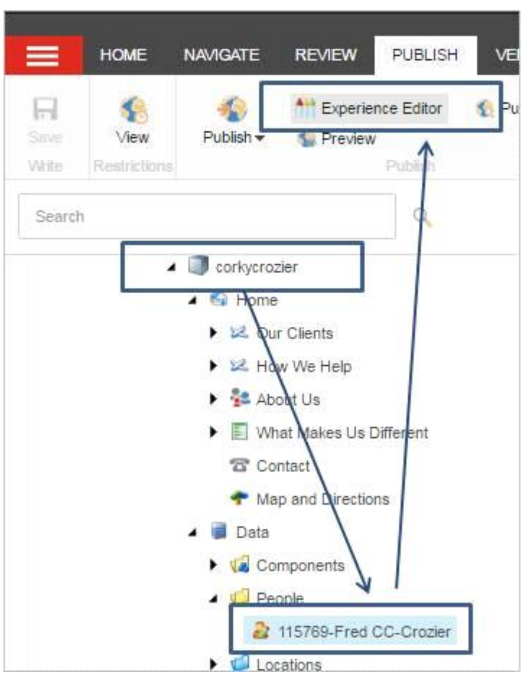
Subject	**RE: Updated Bug/Content Tracking**
From	Whitney Bell - Skybridge
To	Nikki Fulp; James Hood - Veredus
Cc	Dominic Cador
Sent	Wednesday, August 03, 2016 12:21 PM

Ok, that'll work and we will add this to our list of workarounds. I wasn't aware that we could navigate to them that way.

From: Nikki Fulp
Sent: Wednesday, August 03, 2016 12:16 PM
To: James Hood - Veredus <James.Hood@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Cc: Dominic Cador <Dominic.Cador@RaymondJames.com>
Subject: RE: Updated Bug/Content Tracking

So the bug is not that you can't add a bio pages as listed in the spreadsheet – because all of the pages are added. The bug is that you are unable to navigate to it within Experience Editor. These are 2 different things.

To work around this, you will need to go to the site in content editor and select the person item for the bio you need to edit. Click on Experience Editor in the Publish tab to open the page.



NIKKI FULP
Raymond James Marketing
T 727.567.5282

From: James Hood - Veredus
Sent: Wednesday, August 03, 2016 12:10 PM
To: Whitney Bell - Skybridge; Nikki Fulp
Cc: Dominic Cador
Subject: RE: Updated Bug/Content Tracking

Navigating from the site menu (as that is the ONLY way to see bio pages for people) tries to take you to the the person item itself, as you can see from the url in the screenshot that Whitney sent. However trying to access that persons information by using the query string url (bio?_=NAME) works, however when you navigate to a person in the experience editor its not actually using that URL

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Whitney Bell - Skybridge
Sent: Wednesday, August 03, 2016 12:07 PM
To: Nikki Fulp <Nikki.Fulp@RaymondJames.com>
Cc: James Hood - Veredus <James.Hood@RaymondJames.com>; Dominic Cador <Dominic.Cador@RaymondJames.com>
Subject: RE: Updated Bug/Content Tracking

Right, which is a point James brought up weeks ago. But, are not supposed to be typing in Url'S to access pages. We are simply clicking on them within the experience editor…per the usual expectation.

From: Nikki Fulp
Sent: Wednesday, August 03, 2016 12:05 PM
To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Cc: James Hood - Veredus <James.Hood@RaymondJames.com>; Dominic Cador <Dominic.Cador@RaymondJames.com>
Subject: RE: Updated Bug/Content Tracking

What URL are you hitting to try to preview the page? Based on the requested URL in the screenshot, I don't believe you are trying to use the correct URL to preview the page.

NIKKI FULP
Raymond James Marketing
T 727.567.5282

From: Whitney Bell - Skybridge
Sent: Wednesday, August 03, 2016 12:03 PM
To: Nikki Fulp
Cc: James Hood - Veredus; Dominic Cador
Subject: RE: Updated Bug/Content Tracking

We are still experiencing the issue in PROD. I cannot get to the bio page for Bradley La Conte (or the others in the list below, on both themes) the below is the screen that I get. Even though I could do the work around and enter the info in the content tree, without being able to preview bio pages In Cognito I cannot see what they look like.

The one other person that was in the list was overwritten b/c James wasn't able to add the FA, but I was able to add by searching last name only. That was a sSr./ Jr. (third name) scenario.

The requested document was not found

Back

Most likely causes:

- The resource you are looking for (or one of its dependencies) has been removed, had its name changed, or is temporarily unavailable. Please review the following URL and make sure that it is spelled correctly.

What you can try:

- Go back to the previous page
- Go to the start page

Additional Information:

Requested URL:	**/advisor sites/sites/b/r/bradleylaconte/data/people/456929 bradley la conte**
User Name:	**rj\sso_wbell1**
Site Name:	**website**

If the page you are trying to display exists, please check that an appropriate prefix has been added to the IgnoreUrlPrefixes setting in the web.config.

From: Nikki Fulp
Sent: Wednesday, August 03, 2016 11:50 AM
To: Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>
Cc: James Hood - Veredus <James.Hood@RaymondJames.com>; Dominic Cador <Dominic.Cador@RaymondJames.com>
Subject: RE: Updated Bug/Content Tracking

Whitney,

I updated the spreadsheet regarding the bios before but it looks like that update has been overwritten as it is no longer there. I was unable to replicate the issue in QA (i.e. I was able to add and open bio pages for A John Gregg and there was one other person you had listed before that is not in the list still).

There is a bug that is related to theme 7 sites, which would cause error for any bio page in theme 7. This fix will be released with the next code release to PROD. I have confirmed that I can reach the bio pages that would be in question in QA:
- https://scrcm01apwqa.rjf.com/corkycrozier/about-us/bio?_=Corky.Crozier
- https://scrcm01apwqa.rjf.com/davidhogan/about-us/bio?_=David.Hogan
- https://scrcm01apwqa.rjf.com/lanesloangregg/about-us/bio?_=John.Gregg
- https://scrcm01apwqa.rjf.com/staffordschauergroup/about-us/bio?_=Chris.Stafford

From the sites you listed that are two that are theme 6 which I was able to reach the bio pages that would be in question:
- https://scrcm01apwpd.rjf.com/bradleylaconte/about-us/bio?_=Brad.LaConte
- https://scrcm01apwpd.rjf.com/winfordgroup/about-us/bio?_=Frank.Winford

Alt text for the images can be added at any time. Someone will need to be assigned to do this but that will have to be managed from that side.

NIKKI FULP
Raymond James Marketing
T 727.567.5282

From: Whitney Bell - Skybridge
Sent: Tuesday, August 02, 2016 4:34 PM
To: Nikki Fulp
Cc: James Hood - Veredus; Dominic Cador
Subject: Updated Bug/Content Tracking

Hi Nikki,

See the attached for our latest update. There are several items which are now moved to the completed tab. The only major item (in red) is for six sites that we cannot add FA's to; I believe the developers are already working on this, as we reported it two weeks ago. I updated the sheet to list the exact sites that are impacted by this. Let us know if/when you need a list of those FA's that we cannot add bio pages for.

Report is also stored here: \\rjfs3\marketing server sys\INITIATIVES\Alex. Brown\Client Advisor Marketing Support\SC8_BugTracking

**Also want to add that whoever loaded up the banner images in prod did not put any alt text on the images. Not sure if the team planned to use 'null' as the alt attribute for all the img tags, but thought I would point this out for obvious ADA reasons.

V/r,

WHITNEY BELL
Web Administrator

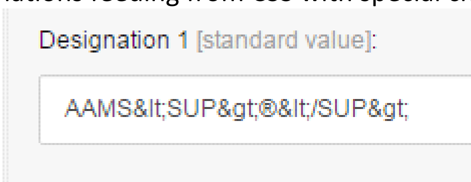
Raymond James Marketing
T 727.567.3344 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

RAYMOND JAMES

Issue: HTML encoded into HTML Entities

Tuesday, December 27, 2016 11:01 AM

Some bios are having their html in the designation area converted to HTML Entities, these should be corrected from our side to have proper html

1. Designations feeding from CSS with special characters are not correct format
   a. 

Issue: IAD site wants a non RJ person to appear on site

Friday, June 09, 2017 11:16 AM

We can add non RJ employees to IAD sites, the bio page is a query string driven page, it needs an identifier to pull anything. The identifier is the email address, in my case its james.hood (james.hood@raymondjames.com)

If the person does not want any sort of email address to appear for the person, bio page will not work. This may change in the future.

NOTE: THIS IS ONLY FOR IAD SITES, NON IAD SITES REQUESTING NON RJ EMPLOYEES TO APPEAR ON THEIR WEBSITE SHOULD GO THROUGH COMPLIANCE TO SEE IF THEY ARE ALLOWED.

Issue: Inline Images in Rich text stretched

Tuesday, July 18, 2017 9:49 AM

Add CSS to your image, add: style="min-height:inherit;min-width:inherit" which will fix the inline stretching issue

Issue: Person doesn’t appear on live

Friday, September 16, 2016 8:20 AM

Situation: You just added a person to a site, they appear on production but not on live.
Workaround: You need to publish the local person item (in the site) and ALSO publish the global person item under Advisor Sites/Global/People
Prevention: If the person has never existed in the site before (totally new to all of this) you have to publish the global item as well, always. **ALWAYS!**
Secondary Prevention Method: When you publish a site, you are not supposed to publish the home item (or you'll miss the data folder), publish the top level SITENAME item, make sure you have selected Publish Related items and Publish subitems.

Issue: Removed image, now bio doesn’t appear on the Bio Tile

Friday, June 09, 2017 10:11 AM

Situation: Bio page has a bio image, and advisor asked you to completely remove it
Problem: The bio will (for now) stop appearing in the bio tile, there will just be an empty <li> element.
Solution: Contact Olivier Bizimungu or James Hood.

Long term: This is a tiny bug that Olivier is looking in to, this was discovered on 6/9/2017. This likely will not happen too often, but if it does, let someone know.

Issue: Theme 6 Bio Paragraphs

Monday, September 12, 2016 9:01 AM

Situation: theme 6 bio page paragraphs each have a 40-60pixel margin on the top.
Workaround: adding the below inline css will fix this issue
Prevention: Developers can fix the layout for this page.

CSS:

```
.bio-detail p:first-child {
   margin-top: 60px;
}
```

Request: 1 Title per line

Tuesday, January 24, 2017 3:52 PM

If an advisor requests that there titles appear like:

Title 1
Title 2
Title 3

The way to do this is to put a break tag
 in the Job Title (before the first title), and in the second between the two titles.

Do not put a break tag in the corporate title area, this may make the bio tile look incorrectly styled

Removing a Person from a site

Thursday, April 06, 2017 11:38 AM

1. **DO NOT DELETE THE PERSON FROM THE SITE FIRST**
2. Find your site
3. Open site name > Data > People
4. Scroll down to the person that needs to be removed
    a. Lock and Edit the item
    b. Scroll down to "Team Information"
    c. Check "Removed"
    d. Uncheck all other checks
    e. Change the workflow state to published
    f. Check the item back in
    g. Publish that bio item
        i. **You must publish this change to the live server so that it marks that person for removal.**
    h. Go in to Components > Bio Tile
        i. Lock and Edit
        ii. Remove that person from the bio tile
        iii. Change the workflow to published
        iv. Check the item back in
        v. Publish the bio tile
5. Verify that the person no longer appears on the site
    a. You can then delete the item from the site

To do this from web site settings:

1. **DO NOT DELETE THE PERSON FROM THE SITE FIRST**
2. Find your site
3. Scroll down to Team Information
    i. Check the box "Remove"
4. Click Save, then Save and publish from the pop up
    i. Verify that the person has been removed from the About Us drop down
5. Go to the content editor
6. Find your site
7. Go in to Components > Bio Tile
    i. Lock and Edit
    ii. Remove that person from the bio tile
    iii. Change the workflow to published
    iv. Check the item back in
    v. Publish the bio tile

Title Order

Friday, June 09, 2017 12:11 PM

Here are some examples:

AWSM Site says…

Jason Voorhees
Corporate Title: Registered Principal a-k-a mask carving aficionado
Job Title: Financial Advisor

On SC8, we would put…

Jason Voorhees
Corporate Title: Financial Advisor
Job Title: Registered Principal a-k-a mask carving aficionado

*****If you see an advisor that has both Financial Advisor AND Branch Manager on their profile, here's an example of what you would do…

AWSM Site says…

Michael Myers
Corporate Title: Branch Manager
Job Title: Financial Advisor

On SC8, we would put…

Michael Myers
Corporate Title: Financial Advisor
Job Title: Branch Manager a-k-a Knifing Kinetics

Always default the corporate title to Financial Advisor. Please do not put both Financial Advisor and Branch Manager on the same Corporate Title line. We want to keep everything separate on their bio. However, if an advisor has more than 2 titles, then that's fine. On another note, if you see that someone has the CFP acronym listed in their designation along with others, list that first in the designation area. CFP is very important and these advisors want it highlighted on their bios. If you have any other questions, let me know!

Designation Order

Friday, June 09, 2017 12:12 PM

If an Advisor is a CFP, that designation should show first

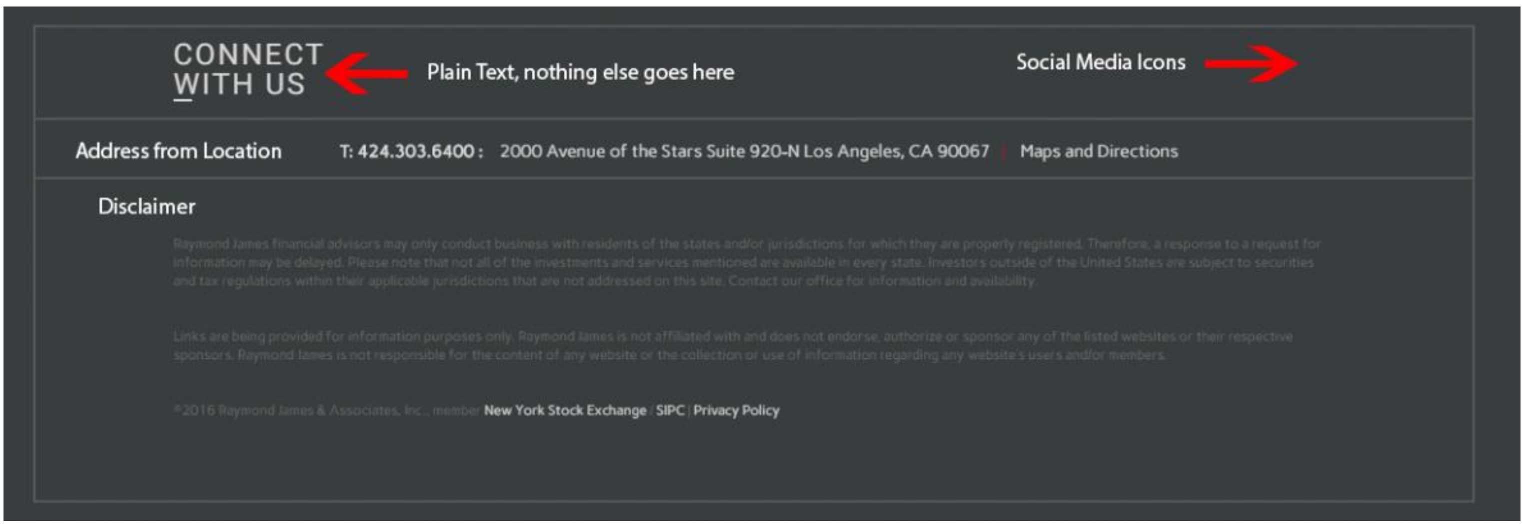
Footer Area

Thursday, September 22, 2016 8:14 AM

We are able to overwrite CSS for the footer area, including the footer label, phone numbers & labels*, and address information.

*Phone number label options are:
Fax
Alternate Fax
Alternate Phone
Toll Free
Mobile
Business
Direct
Home
Unknown

Connect with us: plain text and refers to the whole block, by itself it does nothing, it refers to the social media icons that would appear on the right hand side, if they were in the settings (just need URL's for site)



Social Media Icons

Thursday, September 28, 2017 3:11 PM

1. From the sitename item (or within site settings)
2. Social Media links
    a. Linkedin
    b. Twitter
    c. Facebook
3. You can also add email address (this is done from the content editor under site name item)
    a. This should be the primary contact or the primary advisor

Home Page

Friday, September 01, 2017 9:30 AM

Bio Snapshot (Front Page Bio)

Wednesday, August 30, 2017 1:17 PM

Creating and adding

Bio Snapshot Creation

See this example: https://www.raymondjames.com/stephenchappell

Under the site folder, navigate to Data > Components > Rich Text Content Blocks. Right-click to insert a new Rich Text Content Block.
Name the block **Bio Snapshot**.

Go to the Home page and view the Presentation Details

To add the banner to the top of the page below the navigation

1) Add a Rich Text Content Block
2) Change the Placeholder to Page.Components
    1. Theme 1 you can put the component above or below the banner (or remove the banner if needed)
    2. Theme 2/3 put the component below the banner
3) Click browse and look for the rick text block you created
4) Click ok twice to save
5) Uncheck Display Group name for the site

Navigate back to the Rich Text Content block you created earlier. Lock and edit the item
Click "Edit HTML"

Copy and paste the below text

```
 <div class="row">
    <div class="container card-copy">
        <div class="col-sm-2">
            <img class="img-rounded img-responsive" alt="Mark Dittrich Bio Picture" width="206" src="<!--Advisor Bio headshot url goes here /-/media/rj/advisor-
sites/sites/1/7/1776financial/images/markdittrich.jpg?la=en-->">
        </div>
        <div>
            <div class="col-sm-4">
                <h1 class="animate-down animated fadeInDown">
                    <!--Advisor Name goes here
Mark Dittrich <span>CFP<sup>®</sup></span>
--></h1>
                <h4>Financial Advisor</h4>
                <div class="social-media">
                    <a href="mailto: <!--Advisor Email goes here Mark.Dittrich@raymondjames.com-->" class="fa fa-envelope"></a>
                    <a href="<!--Advisor Phone goes here tel:407.2468877-->" class="fa fa-phone">
                    </a>
                </div>
                <!--Additional Social Media icons
<a href="twitter.com" class="fa fa-twitter"></a>
<a href="facebook.com" class="fa fa-facebook"></a>
<a href="linkedin.com" class="fa fa-linkedin"></a>  -->
            </div>
            <div class="col-sm-6 bio-tiles">
                <span>
<br>
<!--Advisor bio summary goes here
Since beginning his career in the financial services industry in 1992, Mark has spent the past 25 years devoted to helping clients meet their financial needs.
-->
</span>
                <p>
                    <a href="<!--Advisor Bio url goes here
/advisor-sites/sites/1/7/1776financial/data/people/150113-mark-dittrich--> "> Read More</a>
                </p>
            </div>
        </div>
    </div>
</div>
```

Replace the following

Bio headshot url

There are a few ways to retrieve the url for the headshots. You can do it through the design editor by left-clicking on the image and then clicking the "insert sitecore media" icon in the design editor nav. This will bring up an **Insert Media** item menu. Navigate to the image you want and click Insert.

Or you can insert the relative path directly, which will have the same nav setup below. Insert the url the way you would browse for the image in sitecore.

This way is much quicker once you get the hang of it but can be a little confusing at first.

Example
/-/media/rj/advisor-sites/sites/firstletter/secondletter/groupname/imagename.jpg
/-/media/rj/advisor-sites/sites/g/o/goqcig/images/scott.jpg
/-/media/rj/advisor-sites/sites/a/d/advisorsfinancialcenter /images/neal.jpg Next **Replace Advisor Name** with the selected advisor for the Home page.
Then **Replace Advisor Email** with the advisor's email address
If they have additional social media items, please replace just like you did with the emails to use the corresponding fa-icon

.fa-twitter fa-linkedin

fa-facebook

```
  <a href="twitter.com"  class="fa fa-twitter"></a>
                  <a href="facebook.com"  class="fa fa-facebook"></a>
                   <a href="linkedin.com"  class="fa fa-linkedin"></a>
```

Locate the Bio summary comment and insert a one sentence summary OR the first sentence of bio (without using any html).

Finally, insert the advisor's **Bio URL** using the relative path for the advisor's bio page.

Example

/advisorsfinancialcenter/about-us/bio?_=Neal.Griffin

This will allow the bio tile to link in dev and prod. Click save and you're complete

Troubleshooting

Image doesn't have rounded corners and/or isn't responsive.

When changing the URL the classes may have been changed, altered or removed. Double check that the class="img-rounded img-responsive"

Logo

Tuesday, November 15, 2016 9:09 AM

Finding a logo file in Workamajig

Friday, July 14, 2017 2:01 PM

Downloading All Logo Projects Report

1. Log into http://workamajig.rjf.com/
2. Open projects section.
3. Enter logo in Project Name input text box. Press Enter.
4. You will see a detailed list of all projects having a string "logo" in their name.
5. On the upper left section of the window, there are buttons to export this report into various formats.
6. Click on Excel to download this as an Excel report.

Finding an advisor specific logo file

Traditional Approach:

1. Log into http://workamajig.rjf.com/
2. Open projects section.
3. Enter "BR-branch number" e.g. BR-23M in Project Number input text box. Press Enter.
4. OR Try using entering "advisor DBA name" or "website name" in Project Name input text box. Press Enter.
5. The screen will be filled with some project details. Check if it has a project containing logo design for desired website/advisor/DBA.
6. If yes, double click it. A new window pops up showing project details. On the left hand panel, click on Files.
7. The right pane will show some folders. Click on FINAL folder and save it to your drive. It contains various logo files for that client.

Approach two.

As described above, download that Excel report. It is easier to find the Project Name/Number in Excel file. Just copy that project number in step 3 of the traditional approach and proceed as steps 5, 6 and 7.

Adding a Logo

Tuesday, November 15, 2016 9:09 AM

1. Locate your site in Website Management
2. Click on your site
3. Scroll down to Group Logo area
4. Click Manage Group Logos
5. Click Upload Files
6. Find your image
7. Click Close Management Window
8. Check Desktop and Mobile (or what you need)
9. Click Save, Save and Continue (or save and publish if needed)

You may run in to an issue where the logo appears to be the wrong size, to fix this:

1. Click Content Editor from Dashboard
2. Find your site
3. Select the SITENAME item
4. Click Edit
5. Scroll down to Site Settings
6. Click Properties
7. Change the dimensions to the required dimensions, these should be no larger than the required dimensions for logos. See Image Themes & Dimensions
8. Click Ok
9. Put your item back into the published workflow
10. Click Edit to check the item back in and save

Pages

Friday, November 04, 2016 12:34 PM

Custom Page with New Content

Thursday, July 28, 2016 7:54 AM

Experience Editor Version:
1.) Click Insert Page
2.) Select Either Content Page or Landing Page (may be more options in the future)
3.) Name page whatever it needs to be called
4.) Whatever page you are on when you hit insert page will automatically be that pages new parent, creating a page on the home page should put it in the menu as a top level item, creating a page on what makes us different will make a sub item under what makes us different
5.) This will give you a generic page with some components, take out what you don't need, add what you do need

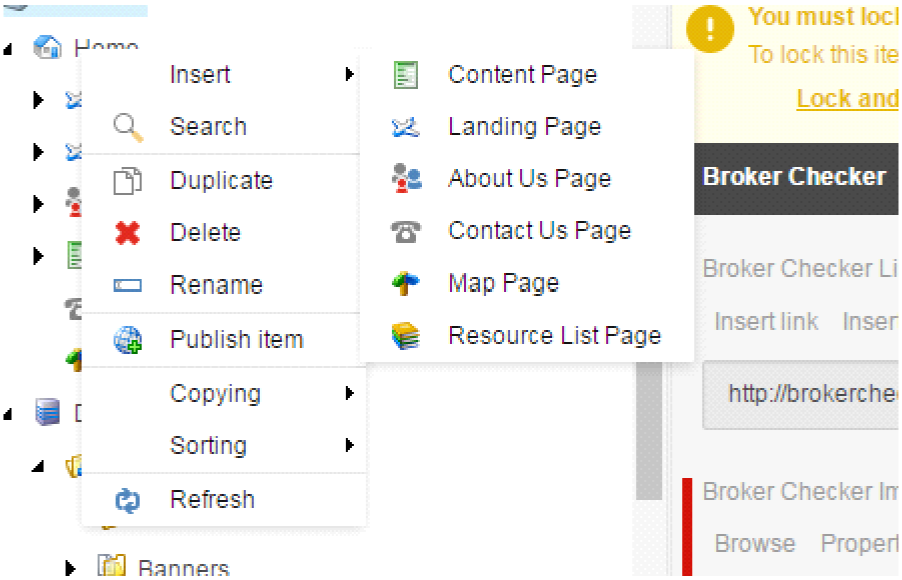
Content Editor:
1.) Right Click where you need the new page in the navigation (what parent item, etc).
2.) Select Insert
3.) Select Insert Content or Landing Page
4.) This will give you a generic page with some components, take out what you don't need, add what you do need

Banners:
Follow the same guidelines for creating a new banner, however do not use the building image!

In your custom page, change the Page Mapping item to some other page (either something that matches the concept of the page from within the current sitemap we offer or select one that comes close) then in your custom banner do NOT select an image. That page will pull whatever image is supposed to be mapped to that page mapping item

Types of Pages

Tuesday, September 13, 2016 9:22 AM



Landing Pages

Friday, September 09, 2016 12:31 PM

Landing Pages are the top-level pages that you see as main items in the nav bar..

1. Landing pages:
   a. When you add a landing page, use a rich text content block so that your content is properly aligned on the page. Place holder is to Page.Components.
   b. Landing Pages can be finicky, and should only be used for top level items. Custom pages should be created with Content pages where applicable

Page Meta Titles

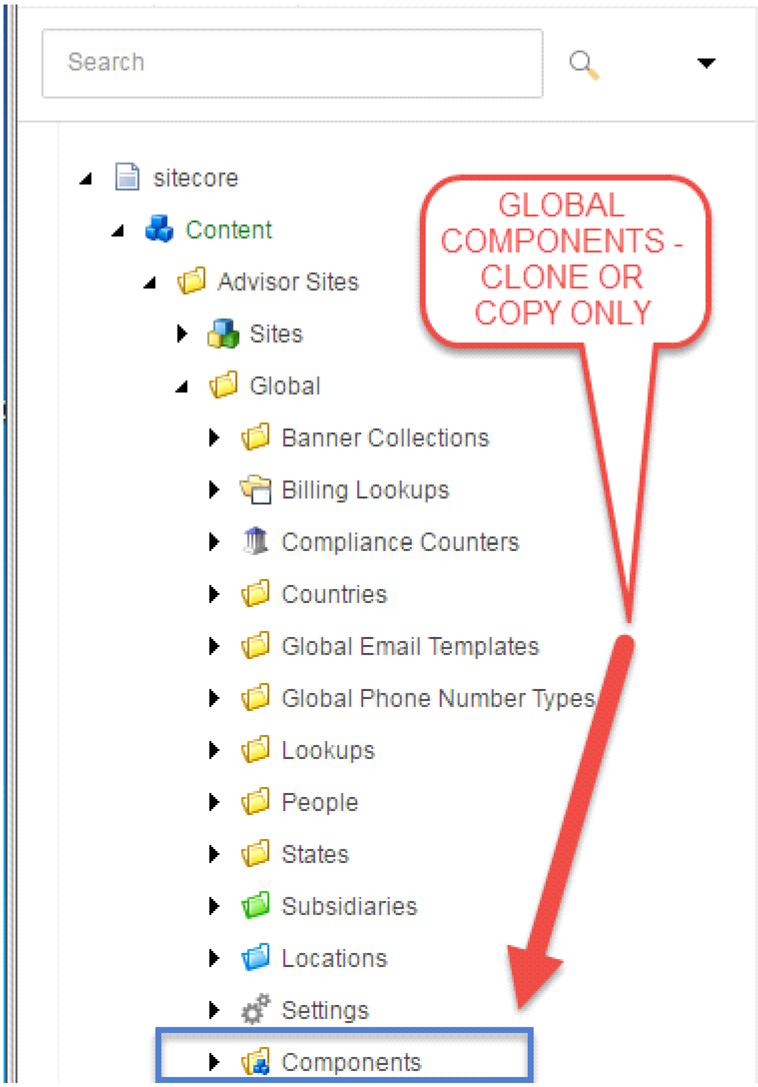
Wednesday, July 12, 2017 11:03 AM

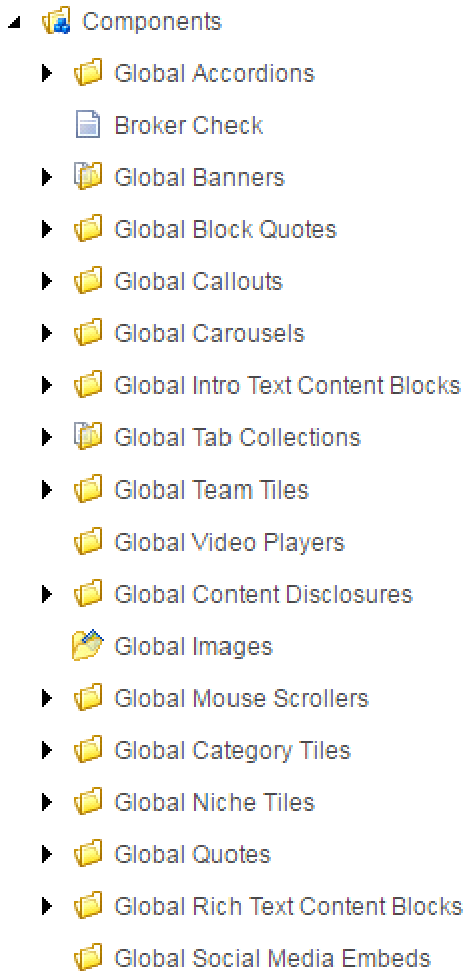
Page Meta Titles are pulled from the first address, if your site has multiple addresses make sure that the correct one is listed first (if only one is displayed, make sure to sort the correct one first)

Components Review

Tuesday, September 06, 2016 9:47 AM

Every site has its own local components folder, which resides in: Data/Components




Components
Global Accordions
Broker Check
Global Banners
Global Block Quotes
Global Callouts
Global Carousels
Global Intro Text Content Blocks
Global Tab Collections
Global Team Tiles
Global Video Players
Global Content Disclosures
Global Images
Global Mouse Scrollers
Global Category Tiles
Global Niche Tiles
Global Quotes
Global Rich Text Content Blocks
Global Social Media Embeds

Sitecore8 Components Review

Monday, September 19, 2016 4:53 PM

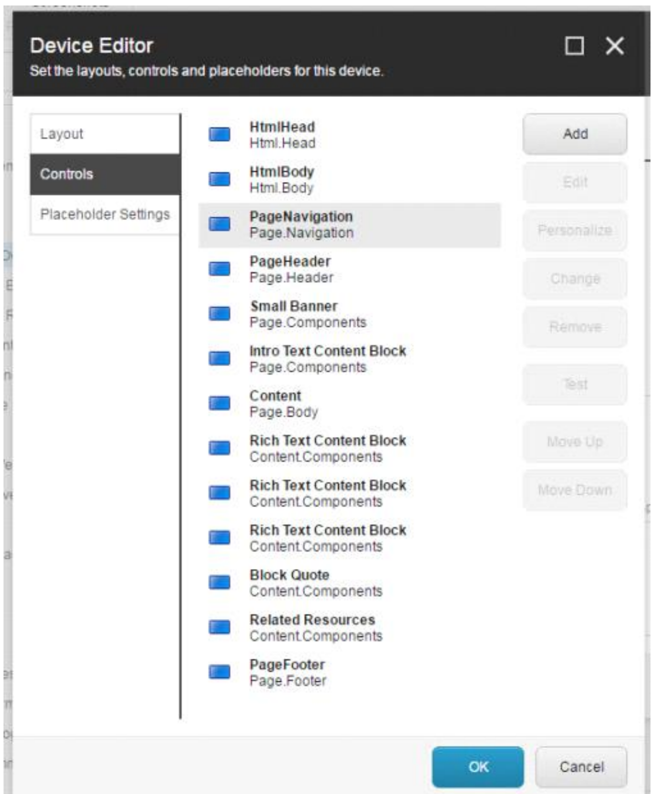
Sitecore8_C
omponen...

Adding Components to Presentation Details

Thursday, September 29, 2016 11:56 AM

From The Content Editor

1. Open Presentation Details for the page you are editing (click presentation from the ribbon, then details)
2. Select Final Layout
3. Click Edit, select Controls
4. Click Add (Advisor Components are under: Renderings/RJ/Advisor Sites/Global/Components. DotCom Components are under: Renderings/RJ/DotCom and either Global or Components (depending on what you need, global contains page structural items)
5. Placeholders:
    1. Advisor Sites:
        a. Home.Components (homepage only)
        b. Page.Components (landing pages only)
        c. Content.Components (Rich Text Components)
        d. AboutUs.Components (about us page only)
            i. Custom text should be added to the intro text component, you will have to create a new intro text component, set placeholder to Page.Components, then copy the pre-existing built in about us text to that, then add the custom text as another paragraph below that
    2. DotCom:
        a. /Html.Body/Page.Body/Components-Right
6. Click Select
7. Click Edit
8. Click Browse on Data Source.
9. Click ok



DO NOT EVER CHANGE THE ADDITIONAL PARAMETERS OF THE PRESENTATION DETAILS

We should avoid interacting with:

HtmlHead
HtmlBody
PageNavigation
PageHeader
PageFooter

Create New Component

Friday, November 04, 2016 12:05 PM

This is a generic how to create a component.

1. Open Data folder for site
2. Open Components folder
3. Select whatever component folder of the type you need to create
    a. If the folder you need doesn't exist yet, you may need to create it
        i. Right Click Components folder
        ii. Select Insert, then insert whatever folder you are missing
4. Right click and select 'Insert' then select your component from the insert options

Accordion

Thursday, September 15, 2016 1:20 PM

Adding an Accordion

Wednesday, November 09, 2016 9:48 AM

1. Create New Component
2. Open Accordions
3. Right Click Accordion Folder
4. Select Insert, select Insert Accordion (this will be the Accordion item that will hold all the other accordion pieces)
5. Insert new Accordion Panel under the accordion you just created
    1. Add title to the accordion panel, and copy
6. Under your main item select your new items
7. Adding Components to Presentation Details

These items can easily be used as a link section, as they do accept html.

*There should only be one Accordion per page. Each Accordion can hold multiple Accordion Panels.

Dynamic Accordions on Landing Pages

Wednesday, October 04, 2017 1:28 PM

1. Create New Landing page
2. Add Content Pages under that page
3. Each Content Page will use its Intro Text Content block as the text for the dynamic Accordion.

Address Information

Friday, October 28, 2016 2:18 PM

Changing/Updating Address

Tuesday, October 18, 2016 11:34 AM

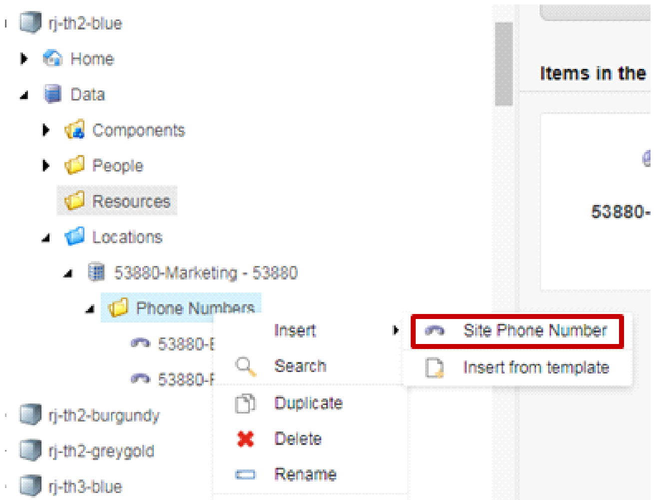
Addresses must be updated with Registrations. This will then sync to CSS within 24-48 hours, and will be automatically updated within SC8 after that. This may need to be re-published within SC8 to make sure it is in effect.

Adding Custom Phone Numbers

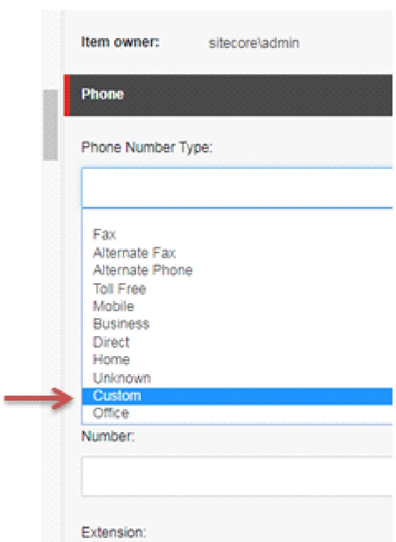
Wednesday, July 19, 2017 1:40 PM

NOTE: This is a controlled workaround that will allow us to manage these until an application side solution is developed.

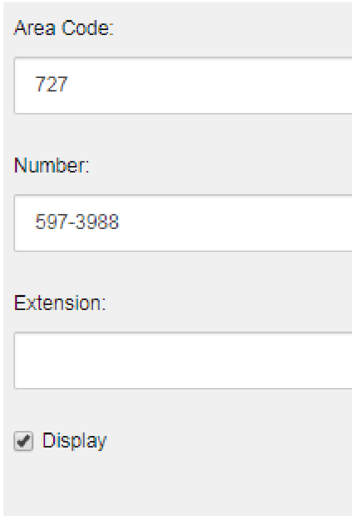
1) Browse to the phone numbers section of the site. It should be located under site>data>locations>address>phone numbers.
2) Right click on the Phone Numbers folder and click “Insert” then “Site Phone Number”



3) When prompted to enter an item name , enter “Custom Phone Number”
4) Once the item has been created, drop down the Phone Number field, and select “Custom”



5) Populate the “Area Code” and “Number” fields on the item (Make sure the ‘Display’ checkbox is checked as well) and then save and publish it.



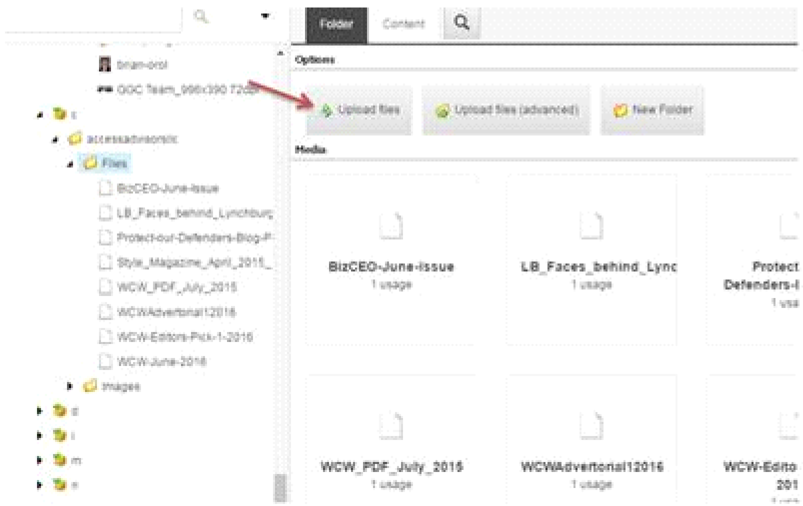
6) The phone number should now display on the site.

Audio Files

Friday, April 21, 2017 11:02 AM

Uploading an audio file

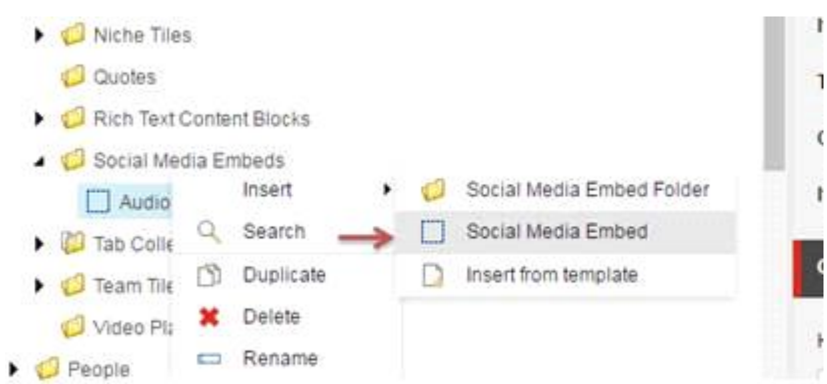
1) Browse to the media folder of the site where you are uploading the audio file.
2) Under the “Files” folder, click “Upload files” and upload your mp3 file.



After uploading the file, pay attention to the item's path

3) After uploading the file, pay attention to the item’s path.

4) In your website’s content tree, browse to the Data>Components>Social Media Embeds.
5) Right click on the “Social Media Embeds” folder and insert a “Social Media Embed”



6) Under the Options heading there should be an empty “Html” field. Insert the code snippet below.

<audio controls>

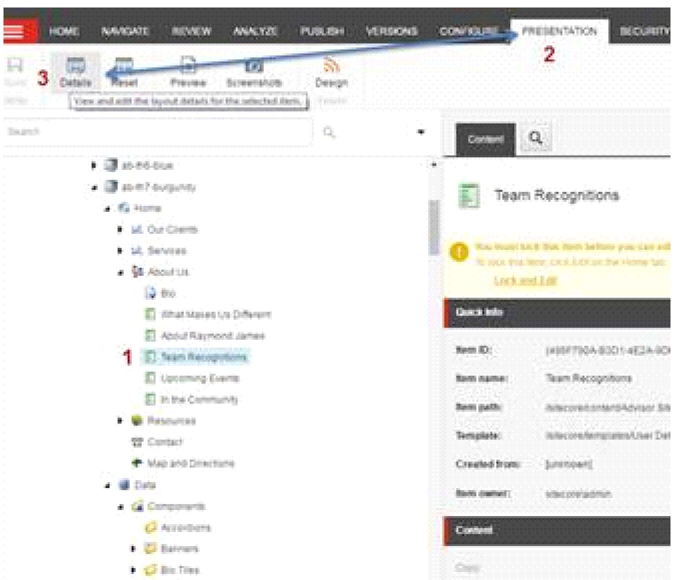
<source src=""**/-/media/RJ/Advisor%20Sites/Sites/a/b/ab-th7-burgundy/Files/filename*.mp3***" type="audio/mpeg">

</audio>

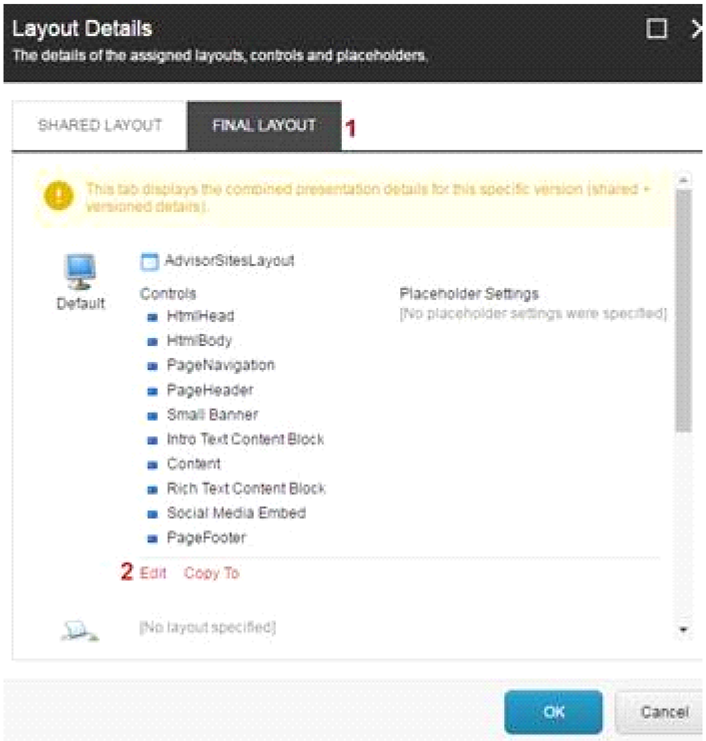
NOTE: If you wish to position your audio file, you can add a DIV around it and then insert the relevant style; Ex. <div style="margin: 0 auto;"> snippet </div>

7) Replace the bolded portion of the path to the mp3 file that you uploaded in **Step 3**. Remember to include the "**.mp3**" extension at the end of your source.

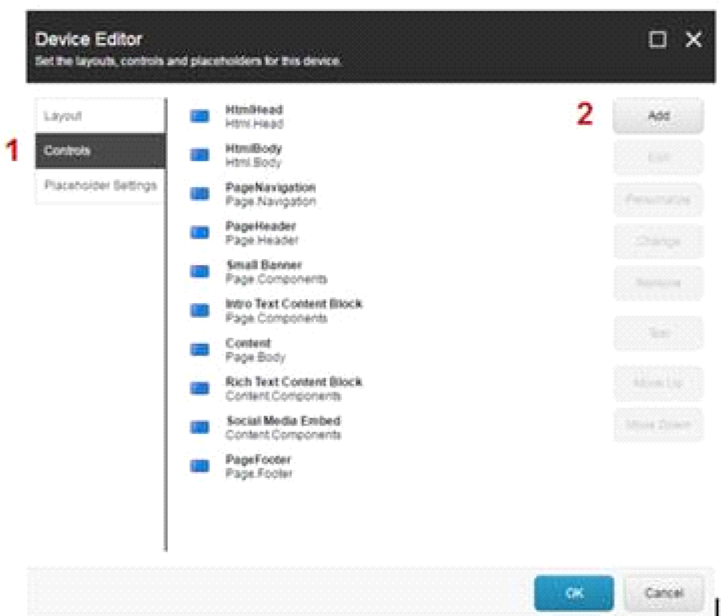
8) Browse to the page where you're adding the audio file and in the ribbon, click the **Presentation** tag and then the **Details** button.



9) Click on the "Final Layout" tab and then "Edit".

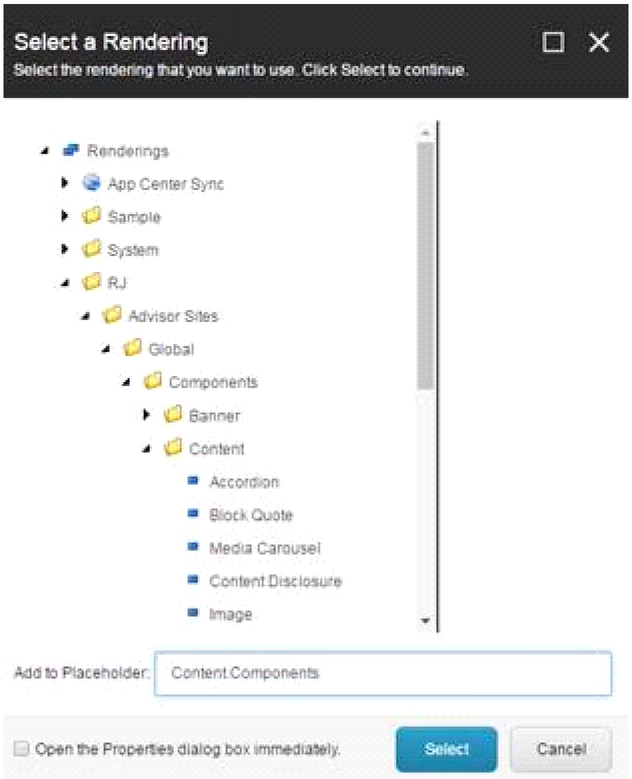


10) The “Device Editor” screen will open and then you click on the “Controls” tab and the “Add”

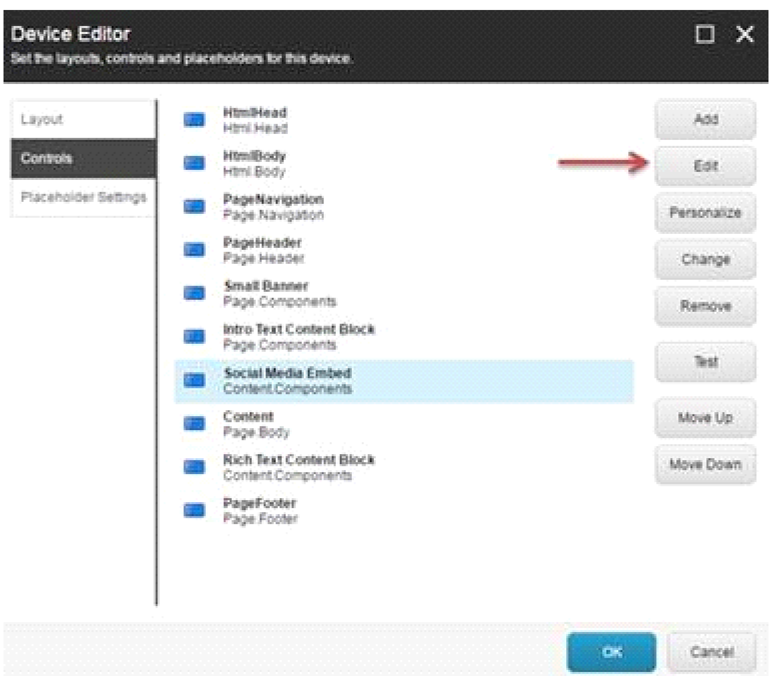


11) The rendering selection screen should open. Browse to **Renderings>RJ>Advisor Sites>Global> Content>Social Media Embed.** Under the Placeholder field, add “Content.Components” and then click “Select”

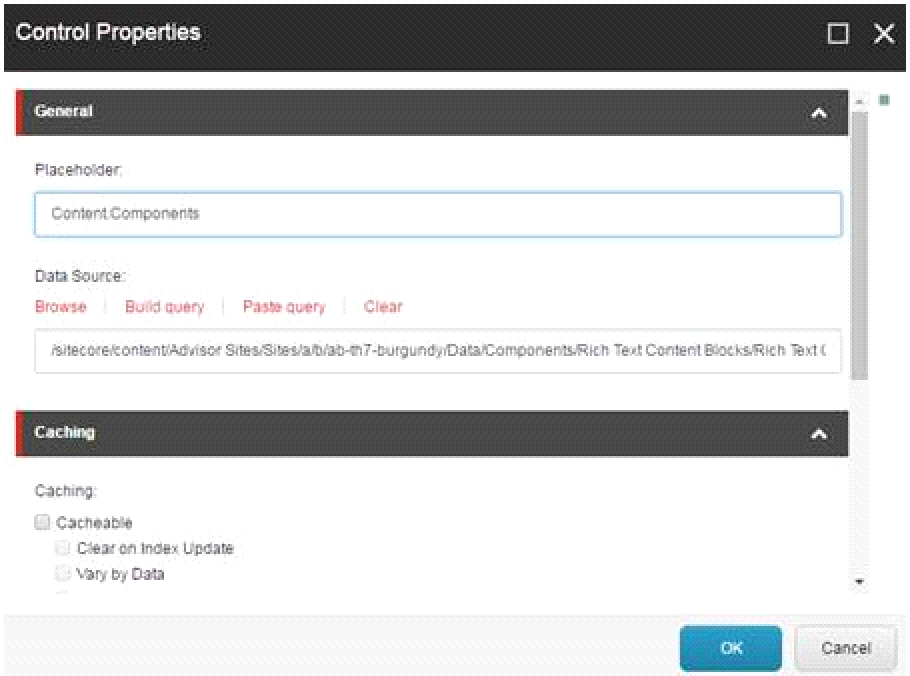
NOTE: The placeholders will always depend on the type of page that you are on. Consult further documentation if you are unsure of which placeholder to use.



12) Select your newly placed control and click "Edit"



13) Under "Data Source" click the Browse button and select the component you add in Step 5.



14) Click “OK” to exit the “Control Properties” screen and then “OK” again to exit the “Device Editor” screen
15) Publish your item and the audio player should now display on your website!

Banners

Friday, November 04, 2016 11:44 AM

Banner Videos

Monday, October 02, 2017 1:50 PM

Upcoming, no ETA, documentation placeholder

Large Banner

Wednesday, September 14, 2016 12:14 PM

Banner header character limit: 75
Banner content: 550
Large Banners are only used on the home page.

Small Banner

Wednesday, September 14, 2016 12:14 PM

Banner header character limit: 75
Banner content: 550
Interior pages will only get small banners, the placeholder for these items is Page.Components

Create: Custom Banners

Thursday, July 28, 2016 7:53 AM

Experience Editor Version:
To customize a banner per page, you will need to:

1.) Copy Banner Component
2.) Select Local Component
3.) Click Change Banner
4.) Select one of the default Banners from the Banner Image Drop Down, click save
5.) Click Copy Banner Image
6.) Open Content Editor, find that specific component (should be in SITENAME/Data/Components/Banners/Images
7.) Browse to the image you want to use, hit save
8.) In Experience Editor hit refresh

Content Editor Version:

1. Create New Component
2. Open Banners
3. Right Click Banner Folder
4. Select Insert, select Insert Banner (this will be the main banner item that points to the other folders for custom content you need to do this step first)
5. Insert new items under each area you need (image, heading, Content)
6. Under your main item select your new items
7. Adding Components to Presentation Details

To get the headline to split properly for both templates you need to enter a carriage return in the headline where you would like it to break. Simply press enter in the copy area. Do not use a break tag.

New Banner Theme (global)

Friday, December 30, 2016 11:41 AM

Prepare your images (they should be at least 1920 wide)

1. Name your images:
   a. Theme Name + number, IE Basketball 01.jpg
   b. Do NOT mix dashs and spaces, only use all dashs, or all spaces
2. Upload images to the media library:
   a. Location Path: Media Library -> RJ -> Advisor Sites -> Global -> Banner Themes -> NAMEOFTHEME
   b. Click on the folder you created in the previous step, then click 'Upload Files (advanced)' to allow you to upload multiple images at once
   c. Select all of your images
   d. Please add an ALT tag to each image
   e. Click Upload

Banner Collection Creation

1. In the Content Editor, navigate to:
   a. Sitecore -> Content -> Advisor Sites -> Global -> Banner Collections
   b. Right Click on Atlanta (best one to use) then select Duplicate, name your new theme
   c. Go into your new theme and map the images to the pages.
      i. **Pro Tip:** Click edit, change image, then hit save, do not check the item back in until you are finished
      ii. Click on Review from the ribbon, Click My Items: unlock all
      iii. Go into the workbox and look at the items in draft, publish all of the global items relating to your theme with your name next to it (this ensures you do not mess up someone elses workflow).
      iv. This will unlock and put all the items into the published workflow.
      v. PUBLISH THE THEME AND IMAGES
         1) You must publish the items before they can be used on a live site, otherwise they will only appear on production

Bio Item

Tuesday, October 03, 2017 8:56 AM

This section will contain information specifically about the "Bio Item" IE, the component found under the Data/People folder

Name Formats

Tuesday, October 03, 2017 9:13 AM

- First Name
- Informal Name
- Middle Initial
    - Show Middle initial
- Last Name
- Suffix

Titles

Tuesday, October 03, 2017 9:13 AM

Corporate Title: Compliance would prefer RJ titles go first
Job Title:

If a person has more than 2 titles, use job title to list the remainder:

Job Title 1,
Job Title 2

Designations

Tuesday, October 03, 2017 9:13 AM

CFP should be listed first if present

Bio Icons (Social Media and other)

Tuesday, October 03, 2017 9:13 AM

Icons Offered: Linkedin, Twitter, Facebook, Mail Icon, Phone, vCard

Bio Image

Tuesday, October 03, 2017 9:14 AM

This loads from the media library, use standards from Image Dimensions & Templates as well as information presented under Naming Conventions and ALT Tags Format

Bio

Tuesday, October 03, 2017 9:14 AM

Takes Simple HTML: Yes

Quote

Tuesday, October 03, 2017 9:14 AM

Plain text only, do not use quotes or HTML

Bio Tile

Wednesday, September 14, 2016 1:24 PM

Add People to Bio Tile

Friday, October 28, 2016 2:12 PM

Within the Content Editor

1. Find your site
2. Open Data/Components folder, click on Bio Tile then the Bio Tile Component
3. Click edit, select all team members who need to appear in the bio tile
4. Set workflow to published, click edit to check back in
5. Add component to About Us Page using techniques outlined in Adding Components to Presentation Details

Adding Bio Tile to About Us

Thursday, March 09, 2017 7:11 AM

This component should already be on the site, but if you ever need to add a new one or re-add an existing one:

1. Create New Component
2. Open Bio Tiles
3. Right Click Bio Tiles folder
4. Select Insert, select Insert Bio Tile
5. Add People to Bio Tile
6. Adding Components to Presentation Details

Multiple Offices

Monday, April 03, 2017 8:42 AM

If there is a site with multiple Offices and the site separates their staff based on who is at what location

The best course of action would be to make two bio tiles, one would be one location (with a rich text header above it) then the second one below that, with a rich text header)
This way you would have two bio tiles, and two headers on the about us page

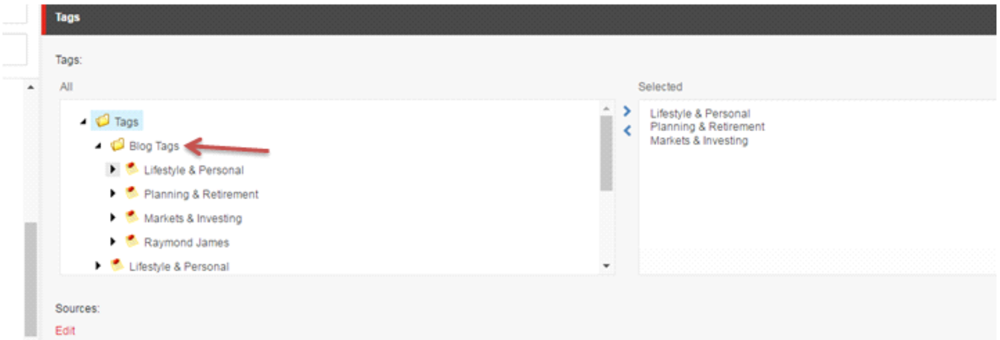
Blog

Thursday, December 08, 2016 9:56 AM

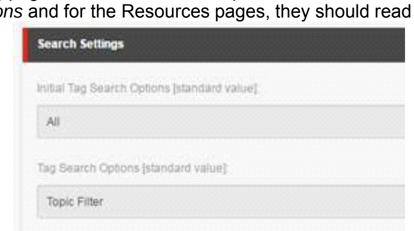
Adding a Blog to a site

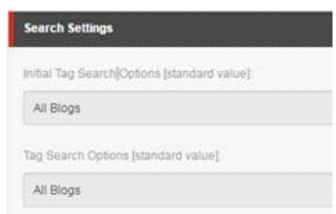
Thursday, December 08, 2016 9:57 AM

1. Right Click under the Data folder and Insert a "Blogs Folder"
2. Right click on the newly created folder.
3. Select Insert, select Blog, name the item
    1. This will add the blog to a folder for the specific day, you will need to set the date on the blog item in case it is a different date than current date
    2. You will need to add Tags and sources
    3. When adding blogs moving forward, please make sure you select tags that are located in the "**Blog Tags**" folder
        a. You may find that the blog does not appear, this may be because you used the tags from the main tag folder, you have to use the tags from within the "**Blog Tags**" Folder



4. blog pages now have two filter options. One is "Initial Tag Search Options" and the other is "Tag Search Options". When creating a new blog, make sure to select "All Blogs" *for both options* and for the Resources pages, they should read "All" and "Topic Filter" respectively.





To add the Blog List to the site itself

5. Open your SITENAME item, right click Home
6. Select Insert, Insert Blog List Page

To Update/Add New Blogs to a site that already has a blog

1. Open the Components Folder for your site
2. Select the Blogs folder
3. On the Ribbon at the top, Select Home
4. To the Right of the Edit button will be a box with Insert options
    1. Select Blog
    2. Name it whatever you need to name it.

Advisor Facing: Editing a Blog

Monday, March 06, 2017 7:15 AM

Olivier has put together this document on Advisors using the experience editor to edit their blogs

Editing a blog through the Experience Editor

Callout

Tuesday, September 06, 2016 9:48 AM

https://alex-brown.com/venturecapitalservicesgroup/our-clients

Callout sizes itself automatically, no option to change size or position on page

Add a Callout

Friday, October 28, 2016 2:34 PM

Within the Content Editor

1. Create New Component
2. Open Callouts
3. Right Click Callout Tiles, insert callout tile
    1. Enter Heading and link information (can be external link, internal link page, media library item, email, anchor, or javascript)
4. Right Click Callout Collections, insert callout collection (this will be a collection of other callouts that you created above)
5. Add to page using information in Adding Components to Presentation Details

Category Tile

Wednesday, September 14, 2016 1:14 PM

EXPERIENCE EDITOR OPTIONS:

- Select between global options

CONTENT EDITOR OPTIONS:

- Full customization

Change out Category Tiles

Friday, November 04, 2016 11:41 AM

These were called "Home Page Differentiators" in some places, but within the system these are category tiles

Content Editor Version:

1. Create New Component
2. Open Category Tiles folder
3. Right Click Category Tile Collections, Insert Category Tile Collection
4. In the new component select the tiles you wish to include in it, Category Tiles use 2 or 3 tiles, no more no less.

Create: Category Tiles

Tuesday, February 28, 2017 8:39 AM

To customize the category tiles (different link, different image, etc)

1. Open Category Tiles folder
2. Right Click Category Tile Collections, Insert Category Tile Collection
3. Right click Tiles, insert Tile
    a. Select:
        i. Tile Heading - (or customize by right click headings folder, insert heading)
        ii. Tile Copy - (or customize by right click copy folder, insert copy)
        iii. Tile Link - (or customize by right click links folder, insert link)
        iv. Tile Image - (or customize by right click images folder, insert image)
    b. If you have customized any of the above items make sure you select those custom items in the Tile
    c. Then in Category Tile Collection you created, select the new tile
4. Change presentation details to point to your new component

Default RJ Blended

Friday, February 03, 2017 4:32 PM

Professional Expertise, Breadth of Services_Blended and About Raymond James

Contact Forms

Monday, September 12, 2016 8:04 AM

Change Contact Form Recipient

Monday, September 12, 2016 8:04 AM

You can change the recipient of the contact form (to use something other than a team member who is currently set as a delegate to a site) by entering the email address in the Contact Form Recipient field on the root item (SITENAME item) in the content editor. By default the contact form uses the primary contact field, however if you use the contact form recipient field ONLY that field is used and primary contact doesn't get used.

This should be rare, as in the past typically an advisor will ask us to change who on the team is getting the email, so it would already be someone on the team, you would change the primary contact drop down to another person

Multiple Contact Forms

Thursday, August 31, 2017 11:26 AM

A site can have multiple contact forms, but both forms MUST go to the same recipient, if the advisors want something special done for multiple recipients they should set up a distribution or group email through exchange (whomever handles that) and handle those special circumstances through outlook rules.

Contact Page Options

Wednesday, September 14, 2016 10:00 AM

Options on changes for contact page:

- Optional checkbox: Show Static Map
- Content can be put on page or current content modified
- Form Labels
- Validation Errors
    - Full name required message
    - Email required message
    - Email invalid message
    - Comments required message
    - State required message
    - Captcha required message
    - Captcha invalid message
- Result Messages
    - Success message i.e. "Your form has been submitted. We will get back to you."
    - Failure message
- Page Metadata
    - Meta title
    - Meta keywords
    - Meta description
- Navigation Title (show or hide in navigation)
- Disclosures

Custom CSS/JS

Thursday, July 28, 2016 7:53 AM

BEFORE YOU USE ANY CUSTOM CSS/JS PLEASE VERIFY WITH OLIVIER

1.) Prepare custom CSS the same way you would for any other site (write it, save it, upload it through the media library to the sites media library *files* folder)
2.) Click on Content Editor
3.) Click on root of site (sitename in the content editor)
4.) Edit, scroll down to Overrides, under CSS Override, click insert media link (You **HAVE** to use insert media link)

These are the same steps for adding Custom JS, just use JavaScript Override instead

Custom Fonts

Monday, October 24, 2016 4:35 PM

You can use the @import rule from Google Fonts to import those fonts into a CSS file. We only use Google Fonts.

For instance (Barton Close):

```
@import 'https://fonts.googleapis.com/css?family=Amethysta';

/* Custom Font Corrections */

.tile-heading,
.team-tile-heading,
.team-tile-heading small,
.category-tiles ul li .tile-info h3,
.banner-title h1, .banner-title small,
.media-carousel-container .title-tile h3,
.site-ft footer h2 {
font-family: 'Amethysta', serif;
}
```

Disclosure

Tuesday, October 18, 2016 9:37 AM

Add a Disclaimer/Disclosure

Tuesday, October 18, 2016 9:29 AM

1. Create New Component
2. Right click Disclosures folder
3. Click Insert, select Content Disclosure
4. Enter name for item (use a descriptive name for this item to make it easier to find)
5. Click ok
6. Copy Field: you can either use the standard editor (click show editor) or click Edit Html
7. Set to published work flow state, check item back in.
8. This item will now be available on other pages for that site to use as a disclosure
9. This will appear in the Disclosures multi select list on any page that allows Disclosures to be selected

Custom Disclosures/Disclaimers

Friday, September 09, 2016 12:18 PM

--- WITHIN CONTENT EDITOR ---
Situation: A team has a page where they want to add a custom disclosure/disclaimer, but when you add, it's not formatted the same as the other page disclosures.
Workaround: Add an additional disclosure/disclaimer directly at the page level on the page item, first create a new disclosure and make sure you use <p> styling to set the line height to **1.25** (when you add a new one, it does not inherit the component properties)
Prevention: Developers need to update the .disclosure class to include the correct line height and font styling (italicized).

Standard inline html formatting:

You do not need to wrap your disclosure in anything special, you will still need to use proper html for the registered mark:

®

But do not wrap the disclosure in anything. Its already formatted at the stylesheet level

CRPC Website Disclosure

Wednesday, November 30, 2016 8:35 AM

This disclosure it not currently in sitecore

Chartered Retirement Planning Counselor^{SM} and CRPC® are trademarks or registered service marks of the College for Financial Planning in the United States and/or other countries.

CIMA Website Disclosure

Tuesday, December 20, 2016 2:34 PM

Investment Management Consultants Association (IMCA®) is the owner of the certification marks "CIMA®," and "Certified Investment Management Analyst®." Use of CIMA® or Certified Investment Management Analyst® signifies that the user has successfully completed IMCA's initial and ongoing credentialing requirements for investment management consultants.

"Freeform" Content Block

Thursday, July 28, 2016 8:24 AM

There are two methods for a "Freeform Content Block"

The easiest way to accomplish this is with a rich text block

1. Create New Component
2. Select Rich Text Content Block folder (can create by right clicking on components, then insert, then rich text content block if one does not exist)
3. Right Click Right Text Content Block Folder
4. Select Insert, select Insert Rich Text Content Block
5. Fill in your content as needed
6. Adding Components to Presentation Details

The second method is using the Social Media Embed Component

1. Create New Component
2. Right Click Social Media Embeds Folder
3. Select Insert, select Insert Social Media Embed
4. Fill in the html, this should be whatever the social media platform uses to embed its content into a page.
5. Adding Components to Presentation Details

Google Analytics

Monday, September 12, 2016 2:47 PM

There is a Google Analytics area on SITENAME to allow you to add the UA number. Additionally there will be a Google Tag Manager area, where you would use the GTM code. No Site should ever contain both numbers (this would result in double reports and erroneous data)

OLD METHOD (DO NOT USE)

1.) Create Google Analytics property for site
2.) Open Notepad, copy tracking code from Google
3.) remove <script> and </script> tags (leave the rest of the code intact)
4.) Save notepad file
5.) change file extension to .js
6.) Upload to media library for site
7.) follow instructions from Custom CSS/JS

NEW METHOD

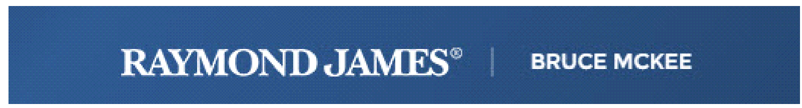
1. Create Google Analytics property for site
2. Go to your sites SITENAME item, put the UA code in the Google Analytics Code area (NOTE: ONLY use the UA-XXXXXXX code, that's all you need)

Group Name

Thursday, March 30, 2017 2:34 PM

The group name area on the website will not take HTML currently.

RJ Logo with Group Name, Theme 2



Intro Text Content Block

Wednesday, September 14, 2016 1:15 PM

Add an Intro Text Content Block

Friday, November 04, 2016 12:11 PM

1. Create New Component
2. Right Click Intro Text Content Block, Insert Intro Text Content Block
3. Fill in your content
4. Adding Components to Presentation Details

Intro Text Workarounds

Friday, September 09, 2016 12:15 PM

Applies to Theme 1 only

If you need to add an intro text component and you do not want the drop caps to be included, (like for a list) then make your first set of tags on the page:

<p> </p>

Media Carousel

Friday, November 04, 2016 11:43 AM

Add a Carousel

Friday, October 28, 2016 2:49 PM

You can add a media carousel to a specific page, this can either be a related resources carousel or a media carousel. The steps to add either are the same, but the end component has different functionality with different presentational features

Related Resources/Media Carousel

1. Create New Component
2. Open Carousel, right click carousel, insert, insert media carousel
3. You can change the heading, and the tag search option, this would display any articles that match those search terms, currently these only match terms/tags already within the system
4. Set workflow to published, click edit to check back in
5. Add component to a Page using techniques outlined in Adding Components to Presentation Details

Each Media Carousel or Related Resources can only currently display articles for ONE Tag or Term

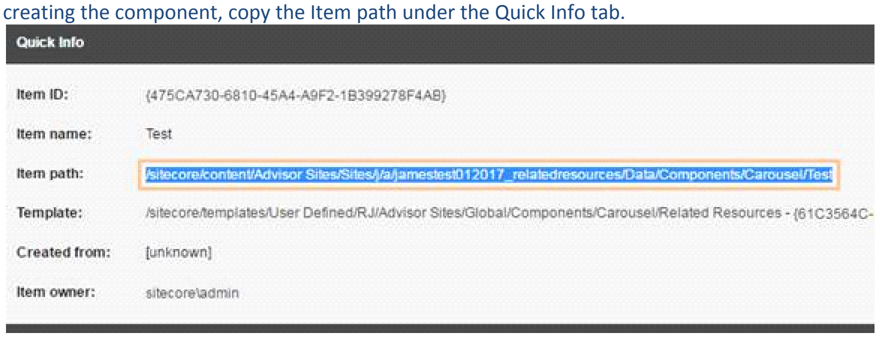
Workaround: Related Resources

Monday, January 23, 2017 7:05 AM

Subject	**RE: QA Testing 1/20/17**
From	Olivier Bizimungu
To	James Hood - Veredus; Monique Smith; David Faith 53880; Jennifer Carpenter
Sent	Friday, January 20, 2017 5:49 PM

FYI, I'll put this on the docket to be fixed but in the meantime, there is a workaround we can use.

1) After creating the component, copy the Item path under the Quick Info tab.



2) After copying the item path, go back to the page where you're adding the component and add the control and then under Data Source, paste in the item path

3) Hit OK, publish and the component should be live.

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: James Hood - Veredus
Sent: Friday, January 20, 2017 9:24 AM
To: Olivier Bizimungu; Monique Smith; David Faith 53880; Jennifer Carpenter
Subject: RE: QA Testing 1/20/17

I was using a content page, on this site I used the what makes us different, on goqcig (the site I noticed this error on) I tried adding it to a custom content page

I did not try this on the EE yet, I can though

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Olivier Bizimungu
Sent: Friday, January 20, 2017 9:22 AM
To: James Hood - Veredus <James.Hood@RaymondJames.com>; Monique Smith <Monique.Smith@RaymondJames.com>; David Faith 53880 <David.Faith@RaymondJames.com>; Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>
Subject: RE: QA Testing 1/20/17

Hey James – can you add the details below to the card?

- A link to the page where you tried to add this
- Did you try adding via the EE?

From: James Hood - Veredus
Sent: Friday, January 20, 2017 9:13 AM
To: Olivier Bizimungu; Monique Smith; David Faith 53880; Jennifer Carpenter
Subject: QA Testing 1/20/17

Site: http://scrcm01apwqa.rjf.com/jamestest012017_relatedresources

Testing related resources component specifically. Cannot add related resources to pages on production, so tested on QA as well. Currently we cannot add related resources. I have recorded this bug on trello

steps to reproduce:

1.) Create site
2.) create related resources component (carousel folder, insert related resources)
3.) select resources
4.) on page of your choice, add related resources item to presentation details, attempt to change data source, get presented with a blank modal instead of the usual place where you pick your data source. Page generates errors in the console

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Mouse Scroller

Wednesday, November 09, 2016 10:19 AM

A Mouse Scroller will by default be selected to be used on the home page. This is how to add additional ones to other pages.

Add a Mouse Scroller

Wednesday, November 09, 2016 10:20 AM

1. Create New Component
2. Right Click Mouse Scrollers Folder
3. Select Insert, select Insert Mouse Scroller
4. Fill in the Mouse Scroll Text (default "Scroll")
5. Adding Components to Presentation Details

Niche/Clients Tile

Wednesday, September 14, 2016 1:16 PM

Niche Tile Cropping Guide

Tuesday, May 02, 2017 7:45 AM

quick cropping guide

Change out Niche Tiles

Friday, November 04, 2016 11:41 AM

Content Editor Version:

1. Create New Component
2. Open Niche Tiles folder
3. Right Click Niche Tile Collections, Insert Niche Tile Collection
4. In the new component select the Niche tiles you wish to include in it

Create: Niche Tiles

Tuesday, February 28, 2017 8:38 AM

To customize the Niche Tiles (different link, different image, etc)

1. Open Components folder
2. Open Niche Tiles folder
3. Right Click Niche Tile Collections, Insert Niche Tile Collection
4. In the same location as above, right click Tiles, insert Tile
    a. Select:
        i. Tile Heading - (or customize by right click headings folder, insert heading)
        ii. Tile Copy - (or customize by right click copy folder, insert copy)
        iii. Tile Link - (or customize by right click links folder, insert link)
        iv. Tile Image - (or customize by right click images folder, insert image)
    b. If you have customized any of the above items make sure you select those custom items in the Tile
    c. Then in the Niche Tile Collection you created, select the new tiles
5. Change presentation details to point to your new component

Quote

Wednesday, September 14, 2016 1:15 PM

Which Quote to use?

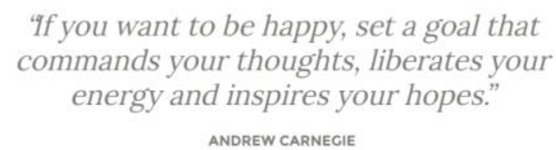
Monday, May 22, 2017 8:17 AM

What Quote component do I use where?

Do you need to show who said the quote? Then use the "Quote" Component

Do you just need a block of text quoted (like say an excerpt from a paragraph that you want to outline)? Then use the "Block Quote"

Quote: This will appear like the home page quote



Block Quote: Inline component on a page

Add new Quote to page

Friday, November 04, 2016 12:05 PM

1. Create New Component
2. Right Click Quote Folder
3. Select Insert, select Insert Quote
4. Fill in the Quote Content (no html, do not use quotes)
5. Fill in Quote Author
6. Adding Components to Presentation Details

Add Block Quote

Wednesday, November 09, 2016 10:18 AM

1. Create New Component
2. Right Click Block Quote Folder
3. Select Insert, select Insert Block Quote
4. Fill in the Copy (no html, do not use quotes)
5. Adding Components to Presentation Details

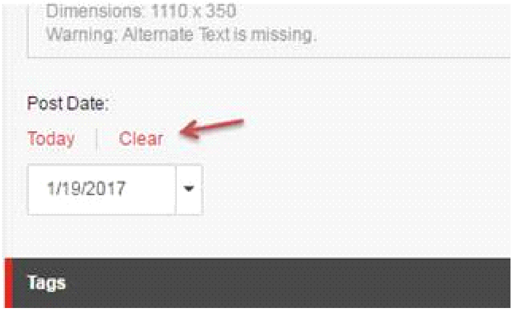
Resources

Friday, November 04, 2016 12:41 PM

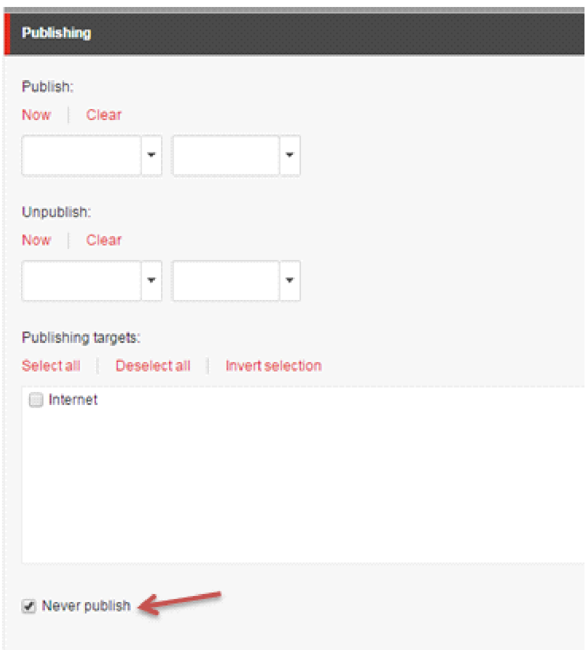
Decommissioning POV Articles

Sunday, April 16, 2017 7:03 PM

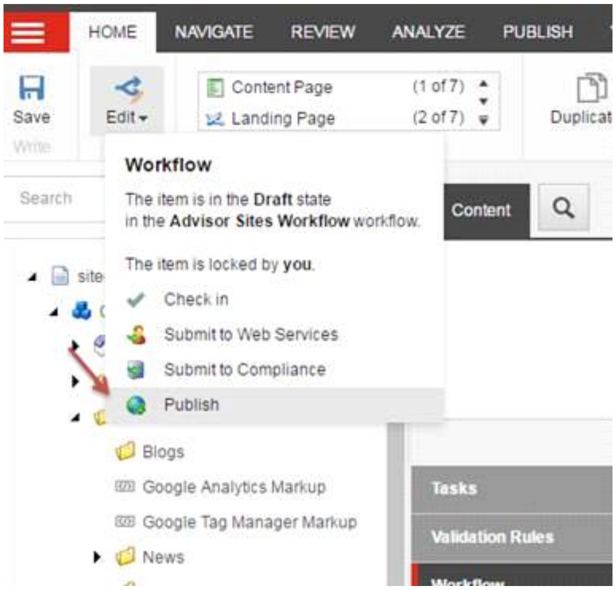
1) Under the “Post Date”, hit the Clear link.



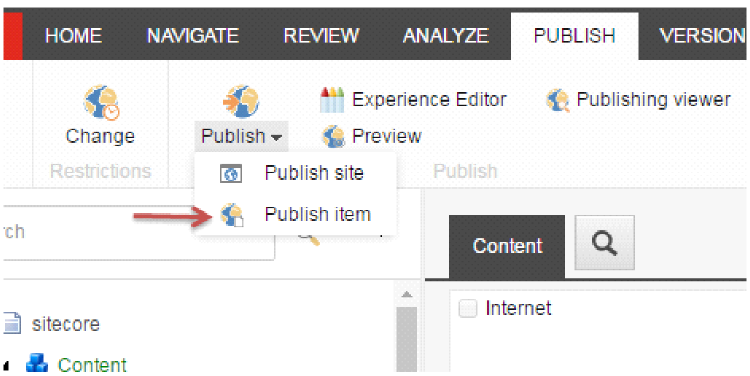
2) Under the “Publishing” heading, check Never Publish checkbox.



3) Move the item through to the “Publish” workflow by clicking Edit > Publish. When prompted to Save the changes to the item, hit the Yes button.



4) Publish the item using the Publish section of the ribbon. Hit "Publish" and the "OK".



Custom Newsletters

Tuesday, September 06, 2016 12:23 PM

Currently the best way to accomplish this is to create it as a rich text content block. A custom accordion may work as well

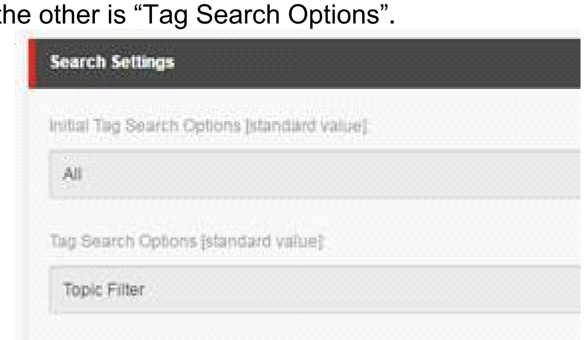
1. Make a custom page (use Custom Page with New Content)
2. Add Rich Text Content Block (use information in "Freeform Content Block")
3. Write content as needed
4. This should be placed as a sub-page under Resources

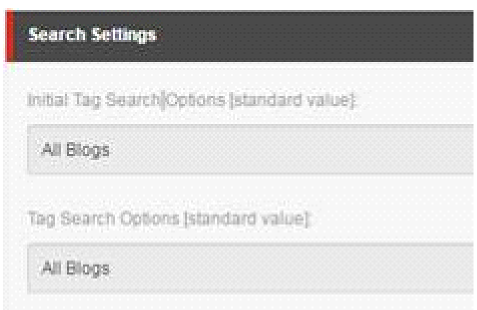
Custom Resources

Tuesday, September 06, 2016 12:00 PM

Content Editor:
1.) Navigate to Data folder under sitename
2.) Right Click Resources folder
3.) Select Insert, Resources
4.) On the newly created item, you need to include:
    a.) Title:
    b.) Image: (if relevant)
    c.) Copy: (html allowed)
    d.) Tags: (what category it would appear under, the secondary item under the main category is the topic)
    e.) Media Type: This is what KIND of resource it is (currently no clue if this changes any presentation aspects of the item)
    f.) Source: (who wrote the article, hit edit, and you'll get a list of possible attributions)

1) You will notice that the resources now have two filter options. One is "Initial Tag Search Options" and the other is "Tag Search Options".





Search Settings

Friday, September 01, 2017 12:24 PM

Scenario: Advisor only wants certain articles to show up in the Resources page
Solution:

1. Open the content editor
2. Find your site
3. Go to SITENAME -> Data
4. Right click on the Data item
    a. Click Insert
    b. Select Search Settings
    c. Click Tag Search Options
        i. It's advisable to name this item what the filter is, what are they trying to do?
        ii. Within the Tag Search Options item, you can select the things you want to show:
            1) Tags
            2) Media Types
            3) Sources
        iii. This may require some trial and error, as it may take a little bit to figure out what tags, sources or media types you want to use
    d. Click Edit, then Save it asks you
5. Go to the Resource Menu item in the content editor
    a. Edit
        i. Change your initial Tag Search Options to the Search settings you just made
        ii. Then check Tag Search Options to the one you just made.
        iii. This ensures that the users will only see the tags you wanted them to see

Rich Text Content Block

Tuesday, September 06, 2016 9:49 AM

https://alex-brown.com/mchughgroup/areas-of-expertise/individuals/environmental-social-and-governance-investing

Add a Rich Text Block

Thursday, July 21, 2016 4:24 PM

Using the EXPERIENCE EDITOR:

1.) lock and edit page
2.) Scroll down to where you need to add the component
3.) Click the area you want to add it to
4.) click add here
5.) Select a rendering pop up will appear, select a component to add
6.) select a data source for this component, if this is custom data scroll down and select "Rich Text Content Block", this will populate dummy data into the component
7.) Click save
8.) click on "copy right text content component" select the plus sign clip board icon, to copy the component
9.) You will now be able to edit the items within the rich text block as needed

Using the CONTENT EDITOR

1. Create New Component
2. Select Rich Text Content Block folder (can create by right clicking on components, then insert, then rich text content block if one does not exist)
3. Right Click Right Text Content Block Folder
4. Select Insert, select Insert Rich Text Content Block
5. Fill in your content as needed
6. Adding Components to Presentation Details

Rich Text on About Us Page

Tuesday, December 20, 2016 12:57 PM

The placeholder on About Us Page for a rich text component is Page.Components

Rich Text on Home Page

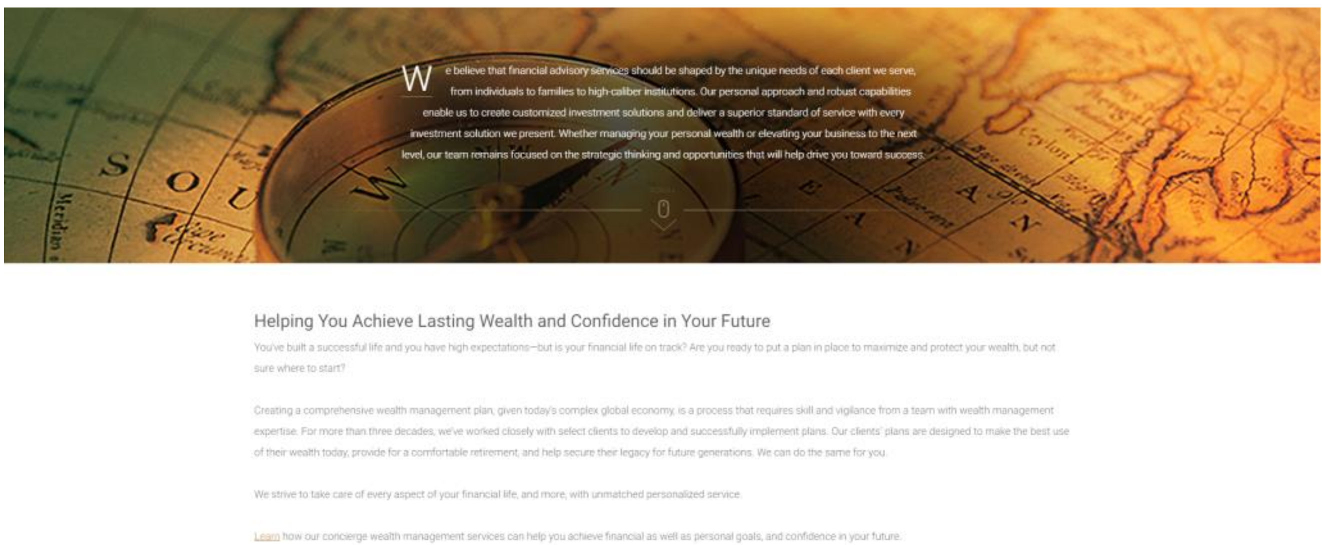
Tuesday, March 21, 2017 11:28 AM

Follow all instructions from [Add a Rich Text Block]() using the content editor.

Placeholder: Home.Components

Code formatting for centering the component:

```
<div class="container">
<div class="row">
<div class="col-xs-2"> </div>
<div class="col-xs-8"><p>Some sort of Text</p></div>
<div class="col-xs-2"> </div>
</div>
</div>
```



Rich Text Workarounds

Thursday, July 21, 2016 3:42 PM

1. **Situation:** If you directly edit the rich text box by clicking into it and typing you will not be able to edit this field again from the UI.
   Workaround: Click on the edit button next to the go button, this will bring up the content editor so that you can edit the copy, you are specifically looking for the field "Bio"
   Prevention: once you click into the rich text field, click the pencil from the pop up menu and edit that way.

   This probably effects all other kinds of rich text fields within the site. Use the controls, try not to directly edit in a field.

   Spacing issue: there is a huge margin top on the rich text content block. Cannot target with css b/c it's part of the .container class. Current workaround is in line with margin-top: -60px

   Issue is on .rich-text, the padding. Globally fixing this is possible, assuming it doent mess up formatting for other areas. Inline would be best for now.

   ```
   .rich-text {
      margin: auto;
      padding: 40px 0; //Offender
      font: 400 15px/2 "Roboto",sans-serif;
   }
   ```

2. **Situation**: you added an image in your rich text content block but it is not responsive.
   Workaround: Adding an image within a rich text content block (by way of editor, not through the image handle, or placeholder for image - appears above text) does not make the image responsive, you must add the html manually.
   Prevention: Have developers update that component so that any images added in them automatically have the `class ="img-responsive"` applied to them.

Photo Gallery

Friday, February 10, 2017 9:57 AM

Using a rich text component, use the following template:

```
<div class="col-md-6 col-xs-12"><figure><a href="" target="_blank"><img src="" class="img-responsive"/></a></figure></div>
<div class="col-md-6 col-xs-12"><figure><a href="" target="_blank"><img src="" class="img-responsive"/></a></figure></div>
```

To offset any column (center a single picture):
Use col-xs-offset-3 (change the last value to however many columns you want to move to the right)

This should give you 2 columns side by side, with a clickable link to view the image in another tab. This could be extended a t some point to use bootstrap modal's. This may be above and beyond web admin, and should eventually be turned in to an actual component. You may need to tweak these, based on your pictures and usage.

The example below is 3 columns, with a clickable link to the image (which will open in a new window)

```
<style>
   figure a img {height:175px!important; margin:5px}
</style>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/bec4edbeb71749608d5d28dbeed62d9a.ashx" target="_blank"><img src="-/media/bec4edbeb71749608d5d28dbeed62d9a.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/fa5a24b021a04892a7735d9c421bbdd4.ashx" target="_blank"><img src="-/media/fa5a24b021a04892a7735d9c421bbdd4.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/bd6072f390c842cba09172a756640042.ashx" target="_blank"><img src="-/media/bd6072f390c842cba09172a756640042.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/98128289de704bd9acc905b437b0249a.ashx" target="_blank"><img src="-/media/98128289de704bd9acc905b437b0249a.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/896afda2c65545b1afe5e46d562cb80d.ashx" target="_blank"><img src="-/media/896afda2c65545b1afe5e46d562cb80d.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/58c63eea90584e42adfa50a9a5584eb2.ashx" target="_blank"><img src="-/media/58c63eea90584e42adfa50a9a5584eb2.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/dece0fe670954a4d8b5fd27991d9106a.ashx" target="_blank"><img src="-/media/dece0fe670954a4d8b5fd27991d9106a.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/e7bd6bf6afa44dfa8cb3bd419b4b4c3b.ashx" target="_blank"><img src="-/media/e7bd6bf6afa44dfa8cb3bd419b4b4c3b.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/89772658f7d74563a810e631c3db931c.ashx" target="_blank"><img src="-/media/89772658f7d74563a810e631c3db931c.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/843d79ce7c1a44bfb390184a0fb38a52.ashx" target="_blank"><img src="-/media/843d79ce7c1a44bfb390184a0fb38a52.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/b91fdf4341e14e6f95f2b0d87f578022.ashx" target="_blank"><img src="-/media/b91fdf4341e14e6f95f2b0d87f578022.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/ddf3c6a5a0f74eb4a3f60e6b5645fe60.ashx" target="_blank"><img src="-/media/ddf3c6a5a0f74eb4a3f60e6b5645fe60.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/aa92bc2008484197a720fe4a1790749f.ashx" target="_blank"><img src="-/media/aa92bc2008484197a720fe4a1790749f.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/8a4a8ced22ab491995e0618ce5cd0097.ashx" target="_blank"><img src="-/media/8a4a8ced22ab491995e0618ce5cd0097.ashx" class="img-responsive"/></a></figure></div>
<div class="col-md-4 col-xs-12"><figure><a href="-/media/67a8294b2981463e95570fdd6d46be13.ashx" target="_blank"><img src="-/media/67a8294b2981463e95570fdd6d46be13.ashx" class="img-responsive"/></a></figure></div>
```

Photo Gallery (Alternate file path Method)

Monday, March 20, 2017 9:57 AM

There is an alternate method for the file path, in the other example we used the internal link in this side, you can use the full path to the file from the server.

For example:

```
<img alt="" src="-/media/rj/advisor-sites/sites/b/w/bws/images/client-appreciation/slider.jpg">
```

This can greatly speed up migrations, or the conversion of pre-existing galleries when you have the images and the code that was used.

Social Media Embed

Wednesday, November 09, 2016 10:22 AM

Facebook Embed

Friday, July 28, 2017 8:13 AM

Code Generator - https://developers.facebook.com/docs/plugins/page-plugin

Attributes:

Settings	HTML5 Attribute	Description	Default
href	data-href	The URL of the Facebook Page	None
width	data-width	The pixel width of the plugin. Min. is 180 & Max. is 500	340
height	data-height	The pixel height of the plugin. Min. is 70	500
tabs	data-tabs	Tabs to render i.e. timeline, events, messages. Use a comma-separated list to add multiple tabs, i.e. timeline, events.	timeline
hide_cover	data-hide-cover	Hide cover photo in the header	false
show_facepile	data-show-facepile	Show profile photos when friends like this	true
hide_cta	data-hide-cta	Hide the custom call to action button (if available)	false
small_header	data-small-header	Use the small header instead	false

Pasted from <https://developers.facebook.com/docs/plugins/page-plugin>

Granville (Example):

<iframe src="https://www.facebook.com/plugins/page.php?href=https%3A%2F%2Fwww.facebook.com%2FGranvilleInvestmentGroup%2F&tabs=timeline&width=340&height=500&small_header=true&adapt_container_width=true&hide_cover=true&show_facepile=false&appId" width="340" height="500" style="border:none;overflow:hidden" scrolling="no" frameborder="0" allowTransparency="true"></iframe>

Add Social Media Embed

Wednesday, November 09, 2016 10:22 AM

1. Create New Component
2. Right Click Social Media Embeds Folder
3. Select Insert, select Insert Social Media Embed
4. Fill in the html, this should be whatever the social media platform uses to embed its content into a page.
5. Adding Components to Presentation Details

Twitter example embedded timeline

 Tweets by w3c <script async src="//platform.twitter.com/widgets.js" charset="utf-8"></script>

Twitter has additional parameters that would need to be passed to the embed, to properly display the timeline in our platform

Twitter Additional Parameters

Example Site:
https://scrcm01apwqa.rjf.com/jamestest102816_rjblended/social-media-test

To Center the component, you can put a p tag around the above example, with style="text-align:center"

Twitter Additional Parameters

Wednesday, November 09, 2016 10:50 AM

Tweets by w3c <script async src="//platform.twitter.com/widgets.js" charset="utf-8"></script>

Twitter has additional parameters that would need to be passed to the embed, to properly display the timeline in our platform

Option	Values	Default	Notes
chrome	noheader, nofooter, noborders, transparent, noscrollbar	Undefined	Toggle the display of design elements in the widget. This parameter is a space-separated list of values
width	Positive integer	auto, derived from container size	Set the maximum width of the embedded Tweet
height	Positive integer	600	Set a fixed height of the embedded widget
tweetLimit	Range: 1-20	Undefined	Render a timeline statically, displaying only n number of Tweets.
link-color	Hexadecimal color	#2b7bb9	Adjust the color of links, including hashtags and @mentions, inside each Tweet
border-color	Hexadecimal color	Varies by theme	Adjust the color of borders inside the widget.
ariaPolite	polite, assertive, rude	polite	Apply the specified aria-polite behavior to the rendered timeline. New Tweets may be added to the top of a timeline, affecting screen readers
theme	dark	light	

From <https://dev.twitter.com/web/embedded-timelines/parameters>

To use any of these additional parameters you'll need to add it to the Anchor link as a data attribute (html5)

Examples:
data-width="400"
Data-height="400"
data-tweet-limit="3"

Linkedin Embed (badge) (testing)

Wednesday, November 09, 2016 10:55 AM

https://developer.linkedin.com/plugins/member-profile

```
<script src="//platform.linkedin.com/in.js" type="text/javascript"></script>
<script type="IN/MemberProfile" data-id="https://www.linkedin.com/in/rbranson" data-format="inline" data-related="false"></script>
```

http://embed.ly/provider/linkedin (works)

```
<a class="embedly-card" href="http://www.linkedin.com/in/rbranson">Richard Branson | LinkedIn</a>
<script async src="//cdn.embedly.com/widgets/platform.js" charset="UTF-8"></script>
```

Tab Collection

Tuesday, September 06, 2016 9:47 AM

What the new tabbed slider looks like:
https://alex-brown.com/mchughgroup/areas-of-expertise/individuals/environmental-social-and-governance-investing

Content is dynamic and slider is responsive

Add Tab Collection

Friday, November 04, 2016 12:19 PM

1. Create New Component
2. Open Tab Collections
3. Right Click Collections insert Tab Collection (holds your tabs you created)
4. Right Click Tabs, insert Tab
    a. Tab Options
        i. Title
        ii. Copy (can take html)
5. Adding Components to Presentation Details

Team Tile

Wednesday, September 14, 2016 1:13 PM

EXPERIENCE EDITOR OPTIONS:

- Change header and content to global selection option
- Change team tile photo

CONTENT EDITOR:

- Full customization

Adding Team Tile

Friday, November 04, 2016 12:15 PM

This is only designed to be used on the home page, however it could be used in other locations. When you start a site you'll only have one team tile, you can make more but may lead to unexpected results.

Team Tile Picture pulls from SITENAME, under site, Team Image section

Team Tile component lets you select the headline, headline url (likely about us page) and copy

Video

Tuesday, October 18, 2016 9:37 AM

Adding Video

Monday, September 19, 2016 1:13 PM

Built in Video Component:

1. Create New Component
2. Right Click Video Players Folder
3. Select Insert, select Insert Single Video (or Video playlist)
4. Name Component according to SC8 naming conventions
5. Find your video Id from Kaltura (this component is only set up for Kaltura videos for now). Paste video ID into IDfield.
6. Set video component to published work flow
7. For Single Video select "Single Video", for Video Playlist select "Video Playlist"
8. Adding Components to Presentation Details

Embedding Videos:
We can still embed videos (youtube and Kaltura for now). There may be occasions where you will need to embed a video use the Social Media Embed and make sure the video is in its own control, use the RJ quick embed tool http://publicdev.rjf.com/responsive/resources/kaltura/ for Kaltura videos (youtube has its own embed tool)

Embedding Videos in a page:

1. Create New Component
2. Right Click Social Media Embed
3. Select Insert, select Social Media Embed
4. Make sure that the name of the item is clearly labeled as “Video”. An example would be “GPM Video”
5. Use the RJ quick embed tool http://publicdev.rjf.com/responsive/resources/kaltura/ for Kaltura videos (youtube has its own embed tool, located in the share option of each video)
6. Adding Components to Presentation Details

Formatting Options:

If a page has a grid of videos, you can use standard bootstrap grid system
If a page has a grid of videos with headers, you can use bootstrap grid with bootstrap panels as below:

```
<div class="container">
 <h2>Panel Heading</h2>
 <div class="row">
 <div class="col-xs-12 col-sm-6">
 <div class="panel panel-default">
  <div class="panel-heading">Panel Heading</div>
  <div class="panel-body">Panel Content</div>
  </div>
  </div>
   <div class="col-xs-12 col-sm-6">
 <div class="panel panel-default">
  <div class="panel-heading">Panel Heading 2</div>
  <div class="panel-body">Panel Content 2</div>
  </div>
  </div>
 </div>
</div>
```

Converting Video Formats

Thursday, April 06, 2017 1:09 PM

There are a number of sites out there for converting videos. We should try to get the original source as often as possible, but during the migration process that may not be feasible.

http://www.zamzar.com/ (use this site on 4/6/2017 to convert an FLV video to mp4)

Forefield Videos

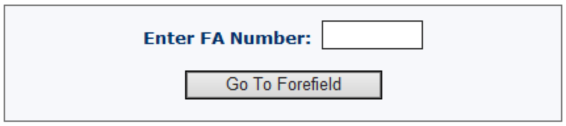
Wednesday, July 05, 2017 11:51 AM

In situations where you will need to add compliance-approved videos from externally hosted sources such as Forefield (Broadridge) you can use a <video> tag, which is HTML5 compatible.

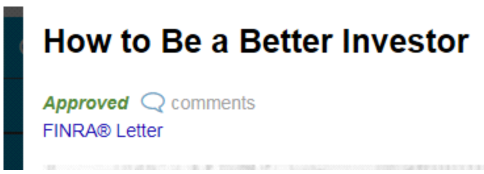
Example: https://www.raymondjames.com/stephenchappell/blog/2017/06/27/How-to-Be-a-Better-Investor

Locate the .mp4 video in a Forefield (Broadridge) article. In Advisor Access, got to Planning > Forefield.

Click on "Go to Forefield" without adding anything into the field.

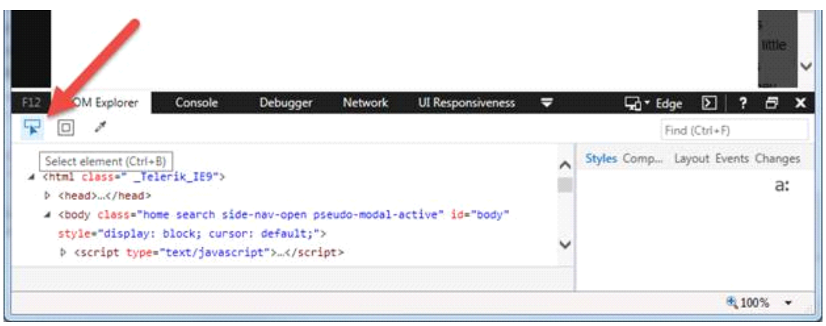


Locate the compliance approved video that you're being requested to add. In Forefield to be sure the video or content is approved by Raymond James Compliance, look for the green ***Approved.***



In Internet Explorer, press the F12 key to enable the Developer Console. Click on the

image in the console.



Then click on the element you wish to investigate – in this case, the video. By default, the console might highlight a different HTML element, and you might need to do some scouting to locate the HTML video.

In the SC8 Content field in a component or item, add the following Video element:

```
<video width="750" height="420" controls="" poster="https://s2.content.video.llnw.net/lovs/images-prod/30f944dd509f4482bb6d148985c4dddc/media/7eb1b356d06f4cca87c75e77d6c9f677/YUW.1280x720.jpeg">
  <source src="https://s2.content.video.llnw.net/smedia/30f944dd509f4482bb6d148985c4dddc/2z/xnDQZPTE417Xs4WPalIAtf44j-peV_0U6o_szRd58/cv_better_investor.mp4" type="video/mp4">
```

```
</video>
```

Be sure to add the height and width.

Feel free to review the Video HTML element capabilities here.

Goal Planning and Monitoring Video

Friday, December 16, 2016 9:55 AM

The Kaltura ID for the GPM Visualize your Future video is:

Video Information	**Video ID**
GPM With Captions Burned in	1_opeyl5s9
GPM Introduction Video	0_7dl7vdzw

AB Page Cheat Sheets (Components)

Thursday, September 29, 2016 1:21 PM

Category Tile

Thursday, September 29, 2016 12:17 PM

The Advisor must select 2-3 of these. Some of the default links may go to pages they do not have though, and will have to be updated manually.

There are duplications, this was done to limit the times an advisor might choose something that doesn't exist, these were changed at the global level, we can change them at the site level to be whatever page they want, in case they have 3 tiles that ALL go to about us

Options as presented in the Website Selection Guide Form

Option 1: Professional expertise
Link: About Us
First Word: Expertise

Option 2: Level of personal service
Link: About Us
First Word: Service

Option 3: Breadth of services/capability (3 different kinds, will be tailored to site map: Blended, Individuals, and Institutions)
Links:
  Blended: Services_Blended (For Blended site maps)
  Individuals: Services_Individuals (For Siloed Sitemaps)
  Institutions: Services Institutions (For Siloed Sitemaps)
First Word: Resources

Option 4: Investment philosophy
Link: Our Approach (Institutions version, Silo)
First Word: Portfolios

Option 5: Accolades
Link: About Us
First Word: Accolades

Option 6: Strength of Alex.Brown
Link: About Alex Brown
First Word: Leadership

Our Approach

Thursday, September 29, 2016 1:28 PM

Option 1 – Individual
Summary: Our experienced wealth management team serves a variety of clients
Component: Our Approach_Individual

Option 2 – Institutional
Summary: Highly customized in its implementation, our institutional plan management is unapologetically disciplined in the actions we take.
Component: Our Approach_Institutional

Option 3 – Blended
Summary: Our experienced team serves a variety of clients, playing an important role in your inner circle.
Component: Our Approach_Blended

Option 1 – Individual

Tuesday, October 04, 2016 11:38 AM

Intro:
Our experienced wealth management team serves a variety of clients, playing an important role in your inner circle. Whether we are providing professional investment consulting or complete financial planning, you can rely on us to take care of the big picture and the finer details with an approach that is as disciplined as it is strategic. It all starts with developing a deep understanding of where you are in life. From there we aim to anticipate your needs, offering personalized attention, the highest level of service with integrity, and the advocacy needed on your side of the table. Our rigorous process ensures a comprehensive plan.

Option 2 – Institutional

Tuesday, October 04, 2016 11:38 AM

Intro:
Highly customized in its implementation, our institutional plan management is unapologetically disciplined in the actions we take. We know your unique needs and responsibilities require that and much more, so our process relies on strategy, in-depth research, reporting and oversight to ensure we've covered the big picture as well as the finer details. Our goal? The ideal outcome for your organization's financial obligations. One that supports your work and all you strive to accomplish financially.

Option 3 – Blended

Tuesday, October 04, 2016 11:38 AM

Intro:
Our experienced team serves a variety of clients, playing an important role in your inner circle. Whether we are providing professional investment consulting or complete financial planning, you can rely on us to take care of the big picture and the finer details with an approach that is as disciplined as it is strategic. It all starts with developing a deep understanding of your needs. From there we aim to offer personalized attention, the highest level of service with integrity, and the advocacy needed on your side of the table. Our rigorous process ensures a comprehensive plan.

In The Community

Thursday, September 29, 2016 1:28 PM

Option 1
Intro: We're grateful for the continual support of our clients and neighbors who have helped us achieve success. It's our honor
and privilege to return the favor as active members of our community. Here are some of the initiatives that are most
important to us.
Component: In the Community 1

Option 2
Intro: As advisors, the well-being of others is always at the forefront of what we do. We are proud supporters of several
organizations that have made it their mission to serve the needs of others in our community.
Component: In the Community 2

Option 3
Intro: With the growth of our firm, we've been fortunate to have the opportunity to pay that success forward within the
community that has supported us over the years. We want to highlight these local organizations that feel similarly
motivated to give back and help others.
Component: In the Community 3

Team Recognition

Thursday, September 29, 2016 1:33 PM

Option 1
Intro: Our dedicated team of financial professionals is proud to have received recognition over the years from our peers and the
community for the service we provide.
Component: Team Recognition 1

Option 2
Intro: We're honored by the trust our clients place in us, and proud of the work we do to help them achieve their financial goals.
This work has earned us the recognition of our peers in the financial industry and within our community.
Component: Team Recognition 2

Option 3
Intro: We are privileged to have received several accolades from the industry for our service.
Component: Team Recognition 3

What Makes Us Different

Thursday, September 29, 2016 1:21 PM

Option 1 – Institutional-Focus
Summary: A collective of expertise, dedicated to your financial success
Intro Component: Difference_A collective of expertise dedicated to your financial success
Rich Text Component: What Makes Us Different_Institutional 1

Option 2 – Institutional-Focus
Summary: Global resources focused service tailored solution
Intro Component: Difference_Global resources focused service tailored solution
Rich Text Component: What Makes Us Different_Institutional 2

Option 3 – Individual-Focus
Summary: Tailored service, disciplined strategies, committed guidance
Intro Component: Difference_Tailored service disciplined strategies committed guidance
Rich Text Component: What Makes Us Different_Individual 1

Option 4 – Individual-Focus
Summary: Thoughtful service and tailored strategies, with your needs at the center
Intro Component: Difference_Thoughtful service and tailored strategies with your needs at the center
Rich Text Component: What Makes Us Different_Individual 2

Option 5 – All Client Types
Summary: Whether you're in need of individual financial counsel or robust institutional strategies
Intro Component: Difference_An experienced team dedicated to your success
Rich Text Component: What Makes Us Different_Blended 1

Option 6 – All Client Types
Summary: Working with any of our advisors means you're working with our entire team
Intro Component: Difference_A experienced team united behind your financial well-being
Rich Text Component: What Makes Us Different_Blended 2

Option 1 – Institutional-Focus

Tuesday, October 04, 2016 11:18 AM

Intro:
We are a diverse team, united behind our clients' goals and driven to help them achieve financial success. Our experience helps us seamlessly integrate with your company, complementing your strengths and incorporating our own gained from years of experience. Working with any of us means you have an office of intellectual capital behind your institution, leveraging our collective experience to provide sound, comprehensive financial guidance.

Rich Text:
We understand our clients' needs and passionately pursue strategies designed to weather market changes and stay ahead of inflation. We develop portfolios that are driven toward long-term success by establishing clear risk and return objectives, and take into account your specific needs and constraints.

We've found that financial success requires a multifaceted approach, and we aim to support clients with our abundant capabilities and tenured expertise. We combine strategic asset allocation, disciplined portfolio rebalancing and attentive monitoring to achieve this, ensuring investments are consistently aligned with the needs and priorities of your organization.

We believe in hard work and integrity, conducting thorough and objective research to discover managers with proven track records and a high level of expertise. We access our widespread professional contacts and conduct rigorous due diligence in an effort to ensure the strategies we deploy align with your objectives.

Taking a collaborative approach and utilizing the full bandwidth of our team's knowledge and experience, we help institutions to navigate evolving markets and stay angled toward long-term success and sustainability.

Option 2 – Institutional-Focus

Tuesday, October 04, 2016 11:19 AM

Intro:
We believe our clients deserve exemplary service, and we are committed to delivering. We pride ourselves on offering the extensive capabilities required to develop tailored financial solutions, with the intimate attention of a boutique firm. Our team seeks to seamlessly integrate with your office, assessing the unique needs and objectives of your institution. We take the time to get to know the principles upheld by your organization, as well as your fiduciary responsibilities, before crafting strategies designed to meet your objectives.

Rich Text:
A superior quality of service requires a disciplined and objective approach. When carefully selecting managers and securities for your investment portfolio, we use our in-depth capabilities to narrow the investment universe to those that match your corporate profile, risk tolerance and preferences. We understand that while growth is important, capital preservation is, too.

This is what exemplary service looks like for an institution that requires the utmost attention to detail. With your long-term objectives in mind, we prudently monitor and tactically adjust your portfolios as needed, in an effort to consistently add value, preserve capital and align with your objectives. We seek to propel your institution's mission forward, providing critical support and innovative solutions so that you can stay on top of the finer details and see the bigger picture.

Option 3 – Individual-Focus

Tuesday, October 04, 2016 11:19 AM

Intro:
It’s rare to find a team like ours. Our experienced professionals have been assembled to offer you the depth of resources, expertise and commitment needed to actively manage and preserve your wealth. We take into account your comfort with risk as well as the values you live by, and use those factors to guide the financial plans we implement. In our experience, the best way to develop a financial plan is by getting to know you, your lifestyle, your values and your goals, so that your financial plan is just that – uniquely yours.

Rich Text:
We dedicate our extensive industry knowledge to implementing thoughtful financial planning, developing strategies to see you through life’s most important milestones. We are prudent in managing your assets and carefully selecting investments that match your needs and risk tolerance. Our business is serving you and managing your finances in a way that makes you feel confident about your financial future.

We pay attention to the details and design financial plans tailored to each individual client. And we choose to overlook most passing trends in favor of those we feel could give you the best chance of reaching your financial and personal milestones. We believe prudently managed wealth serves as a means to get you where you want to go, and we’re committed to delivering our best advice to help you get there.

Option 4 – Individual-Focus

Tuesday, October 04, 2016 11:19 AM

Intro:
Our business was built to serve you. Collectively, we offer decades of experience, which we dedicate to crafting innovative, thoughtful financial strategies for clients. We take the time to get to know your lifestyle, goals and values, so that we can deliver a plan designed to propel you toward the future you've envisioned for yourself and your family. Offering the breadth of resources and capabilities of a large corporation, we provide the tailored, attentive service of a small firm.

Rich Text:
When implementing a financial strategy, we leverage the full expertise of our team, conducting thorough research before hand-picking investments that are consistent with your tolerance for risk and designed to help you achieve your objectives. We offer independent guidance, with your financial needs and preferences at the center of everything we do.

We advocate for your long-term financial success, through persistent management and on-going guidance. By utilizing the full bandwidth of our firm's knowledge and expertise, we provide the service and counsel necessary to enhance your financial outlook and propel you toward your goals.

Option 5 – All Client Types

Tuesday, October 04, 2016 11:19 AM

Intro:
Whether you're in need of individual financial counsel or robust institutional strategies, we've built our business to address the varied needs of our diverse clientele. Our smallest and largest clients deserve our full attention, and we deliver that attentiveness with guidance that's tailored to your unique challenges and objectives. We take the time to get to know your values and long-term goals, carefully crafting plans that support the future you're working toward.

Rich Text:
As a focused and experienced group, we provide the resources and expertise of a large firm, with the consideration and service typically found at a small boutique. We develop strategies with an emphasis on minimizing risk and enhancing long-term success, fortified by thorough, objective investment research and selection.

We work alongside our clients, ensuring our strategies are consistently angled toward their ideal financial outcome. We see your goals as an extension of our own, and work tirelessly to help you.

Option 6 – All Client Types

Tuesday, October 04, 2016 11:19 AM

Intro:
Working with any of our advisors means you're working with our entire team. We leverage our collective experience and expertise to ensure you receive the well-rounded guidance and knowledge that has been proven time and again to serve our clients best.

Rich Text:
We've had the pleasure of working with a range of diverse clients, from large institutions to families and business owners. This agility has allowed our team to hone the skillset required to provide uncompromising financial service.

We develop tailored portfolios and financial plans, seeking out opportunities from a global vantage point and factoring micro- and macroeconomic conditions to develop plans designed to sustain over the long term. Each strategy we employ is intended to balance growth with the appropriate level of risk, while furthering your financial goals.

We commit ourselves to thorough research and an intense vetting process, so you know that the investments and managers we recommend offer qualities that enhance your investment portfolio. We tap into our network of professional contacts and hold frequent calls to ensure their approach aligns with our own.

The advisory relationship should be ongoing, growing stronger with time. We actively manage and monitor portfolios to ensure they stay consistent with your goals, using the original strategy as a guidepost. We commit our full capabilities as a team to your success, united behind the pursuit of your ideal financial future.

Initial Training Session Notes

Tuesday, June 07, 2016 9:01 AM

OVERALL NOTES

- 'Speak' is the framework that allows them to create multiple apps in SC8
- Will not be able to add custom styling, will require a code release per Nikki
- Implementing SC8 functionality into non-Sitecore sites, content sharing
- 'Federated' will allow us to feed content into outside sites, not hosted by using a snippet of code
- Layout A = Theme 7
- Layout B = Theme 6

TEAM INFORMATION

- Bio pages can be removed from navigation by unchecking that item within the team info section - website management of SC8
  - Using remove is better because it removes them from certain lists
  - There will be a new column added for 'deactivating' team members so that it really removes them but will grey out their name in the team info section
- Address info is pre-filled based on team members that are added
  - Multiple addresses are also allowed, should pull in automatically
  - Phone number labels editable for only the main number display
- Adding team members: you can search by name, branch number or CSS ID
  - It'll give you a list of all team members at a branch if you do that

WEBSITE SETTINGS

- Setup, status, and site info
- Group name, header that shows up at top of homepage beside logo
- Main contact, will prefill based on list of team members who also have delegate rights
- Mobile navigation checkbox forces mobile nav. at all window sizes
- Social media links are what is in the footer on the entire site
  - Minimum requirement is www. (https auto-fill)
- Logos: manage group logos opens the media library in a modal window. Logos may be pre-set for desktop vs mobile
  - Window sizes/breakpoints need to be defined…mostly just phones
  - Logo selection is automatic and based on domain selected
    - Current domain options are alex-brown.com or raymondjames.com
  - Add a custom logo by loading it to the sites *Group Logos* folder (with their media library files)
- Checking the maps box within the address information allows the map/directions feature to be enabled within the footer

BANNERS

- Large banner (homepage only) has header and sub head, content can be displayed to lay over the image
- Small banner, header, image, no content

GLOBAL VS SITE-LEVEL CONTENT

- Person details will default to the global, if you do not touch that item
- If an update is made in CSS, and you have over-written that item, your changes win
- Team tiles are not global items > team tiles are local only, same with the bio tile (composed of team members)
- Components are global and local (global is named accordingly)

- Site-specific components reside within the Data bucket

MAPS AND DIRECTIONS PAGE

- Name, state, email and comment are what is required to submit the form

CONTENT PAGE

- Will only have rich text components available to use, blockquote component
- Rich text component has the ability to add an image and choose alignment
- There will also be a video component available for this area

LANDING PAGE

- Dynamic accordion component automatically added > what makes this page different from the content page
- The dynamic accordion serves as a sub nav that goes out to sub-pages
    - Default title to dynamic accordion is exactly the same as the page name. There is a separate field on those landing pages where you can change the name of the page

EXPERIENCE EDITOR

- Display name: what you see when you are in the content editor
- Item name: what is used to structure the URL

RJ Template Concepts

Monday, September 12, 2016 4:50 PM

Concept 7

SC8Layouts
C7

Concept 6

SC8Layouts
C6

SC8 101: Training Plan

Monday, September 12, 2016 4:09 PM

PART 1 - TEAM-WIDE

1. Start with launch pad, give intro to what areas will be used
   a. Website management
      i. Site list
      ii. Using site list filter
      iii. Making updates to site: site name & URL, domain, image theme, layout, banner image theme, group name, phone numbers, etc.
   b. Experience editor - site edits to homepage, bio pages, team recognitions and community involvement pages
   c. Media library - overall usage, versioning control, proper naming conventions (for all items)
   d. Workbox - pushing items through the queue, critical
2. Experience editor usage - following lab guides
3. Overall FAQ's - what we can and cannot do
   a. Use James' SC7 frequent requests document as guide for comparison
4. Touch on common workaround section
5. Bug reporting

**Resources:
1. This One Note
2. Web services lab guides
3. One-pager quick reference

PART 2 - ADMINS ONLY

1. Cover naming conventions and organization within CE

Sitemap Notes

Wednesday, October 26, 2016 8:46 AM

Subject	**RE: RJ Sitemaps in prod**
From	James Hood - Veredus
To	Olivier Bizimungu; Dominic Cador; Whitney Bell - Skybridge
Cc	Jennifer Carpenter
Sent	Friday, October 21, 2016 1:47 PM

The RJ-Blended site currently on production, created yesterday (https://scrcm01apwpd.rjf.com/rj-blended) doesn't currently have a disclaimer set in the site information field of the SITENAME item.

I assume this will be updated?

JAMES HOOD
Web Administrator

Raymond James Marketing
T 727.567.5423 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Olivier Bizimungu
Sent: Friday, October 21, 2016 11:28 AM
To: Dominic Cador <Dominic.Cador@RaymondJames.com>; Whitney Bell - Skybridge <Whitney.Bell@RaymondJames.com>; James Hood - Veredus <James.Hood@RaymondJames.com>
Cc: Jennifer Carpenter <Jennifer.Carpenter@RaymondJames.com>
Subject: RE: RJ Sitemaps in prod

FYI. The issue regarding the logo below should now be fixed.

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

From: Olivier Bizimungu
Sent: Thursday, October 20, 2016 6:14 PM
To: Dominic Cador; Whitney Bell - Skybridge; James Hood - Veredus
Cc: Jennifer Carpenter
Subject: RJ Sitemaps in prod

Hi team,

Both RJ sitemaps should now both be in production.

Whitney and James, thanks a lot for your feedback from the sitemaps in QA. A lot of it was taken into account and helped me d eliver a more complete set.

A few things
- I've reordered the sitemap list in the Wizard to help you make sites faster.
- Currently if you create a site under the RJ domain and try to change it to AB, it will not save. This defect is fixed in QA a nd the fix will be deployed at the next release. Worth point out that going from AB > RJ should not be an issue.
- I've also fixed the issue where a few landing pages that have an intro and rich text component were displaying a misaligned s econd paragraph. The "What Makes Us Different" page also had this issue but it was for different reasons. I fixed this with dev input but there are some retro work needed f or the existing sites. I will send a separate e-mail for that.
- I've removed Key Client Partners and Monetization Services from these maps.
- The RJ logo is not displaying and I'll be looking into this. It shows up fine on QA so it could be a content issue on Prod. I f it turnouts that a deployment is need to fix this, we'll have to use a workaround until then.

As always any additional feedback/bug reporting is welcomed.

Thanks,

OLIVIER BIZIMUNGU
Senior Product Analyst

Raymond James Marketing
T 727.567.5353 // F 866.597.3988
880 Carillon Parkway, St. Petersburg, FL 33716

Google Tag Manager

Tuesday, November 15, 2016 12:53 PM

Currently all AB Sites use 2 Google Analytics Universal Tracking Codes, as well as an Adwords Remarketing tag. These scripts are currently being added to the sites using JS overrides

In the coming months there will be a change to production sites that allow us to put Google Analytics tracking code (UA code) or the Google Tag Manager code on the site directly from the Content Editor.

To convert one of these current AB sites over to this method, you will:

1. Either create, or get the UA code (they still need to have a Google Analytics account)
2. Create a Google Tag Manager account
    a. Click on Variable
    b. Under User Defined
    c. Click New
    d. Click the pencil icon on the upper right hand side of Variable Configuration window
    e. This presents "Choose Variable Type" select Contant
    f. Copy in the Google Analytics property code into the value field.
    g. Name your variable (easy to use gaProperty).
        i. You will use this variable in a tag later
    h. Click Tags
    i. Click New
    j. Name your new Tag (something easy to understand, gaViews for instance)
    k. Click Edit on the upper right of Tag Configuration
    l. This brings up "Choose Tag Type", select Universal Analytics
    m. For Tracking Id you will use your variable you just defined
    n. Click on the Lego block looking icon, select a variable, select your gaProperty variable
        i. Track Type: Page View
        ii. Triggering: All Pages
    o. Additional tags will be created using the same kinds of techniques.

3. Adwords Tracking Code: The code currently being used on the AB sites may only be for AB, there may be a specific one for RJ sites, will need to touch base with team.
4. There is a secondary GA property for the AB sites, which reports information back to another account. You'll use the same steps outlined above.
5. One the Sitecore 8 back end, you'll only enter the GTM tag ID, as GTM will report page views and any other custom information back to GA.