



Private Placement *investors* Association

Quick Start Guide

USPPIA.COM Quick Start Guide

By Dan Olson
danolson312@gmail.com

Copyright © 2014 Daniel Olson
All rights reserved

Published February 2015

Contents

Introduction	4
Login.....	4
Dashboard.....	4
Posts versus Pages	4
Pages	4
Posts (Resources).....	5
Events.....	6
Members List and Contact Information (TablePress) (Style 1).....	6
To edit the TablePress table	6
Members Area Contact Information (Style 2).....	6
Menus	6
Users	7
To edit a User	7
To Activate/Deactivate a User	7
Hosting and Google Analytics	7
Webmail.....	7
FTP Login.....	8
Billing & Account.....	8
Google Analytics.....	9

Introduction

This guide is meant to be a quick start guide written specifically for the USPPIA.COM website administrators. Included are the quick and easy instructions for the most common administration tasks that you may encounter. The second guide, Easy WP Guide, is a more in-depth, yet still easy to read and follow manual for digging a little bit deeper into the administration of the site. It is by no means meant to be a technical manual. Refer to the Easy WP Guide throughout this quick start guide pointing to more detailed instructions on any of the topics below, if needed.

Login

As site admins (admins), you should already have a login username and password setup. The site uses email addresses for usernames. If you don't know your password, click on the Login/Register menu to bring you to the login page. From this page you can click on *Forgot password? Click here to reset* to have your password reset.

Dashboard

As an admin, you will see the standard admin dashboard and toolbar. In the dashboard, you will find all of the common administrator tasks that you will need. There are also quite a few other options. We will not get into all of the options in the dashboard in this guide.

Posts versus Pages

USPPIA.COM uses Pages and Posts in its general design. Most pages are merely “holders” for posts. The actual content is stored in posts. There are a few exceptions to this rule. We will look at each page briefly below. Some pages are referred to as being dynamic or static. Dynamic pages are dynamically fed with data based on other aspects of the site such as tables or posts. Static pages are just that, static content that must be manually edited. As an admin, you have the option of editing any of these pages with the (Edit) link at the bottom of the page.

Pages

- Home – This is the static landing page. This page is publicly available.
- About PPIA – This is a static page with a brief description of the history and mission of the organization. There is also a static list of Officers and Board Members. This page is publicly available.
- Events – This is a dynamic page that lists future and past events. The events are Posts that contain the information for each event. See [Events] below for more information. This page is publicly available.
- Resources – This page is a static repository for links to related websites, forms and documents. This page is publicly available.

- Members - This is a dynamic list of Institutions that have members in USPPIA. This list is maintained in TablePress as a simple table. See [TablePress] below for more information. This page is publicly available.
- Members Area - This page (or the pages within) is NOT publicly available.
 - Organizational Documents
 - Meeting Minutes
 - Contact Information for Members
 - Request for Feedback
 - Committee Information
- Contact Form – This is a contact form that visitors can use to contact PPIA. It sends emails to info@usppia.com. This page is publicly available.
- Login/Register – This page is used to login, register, reset passwords, etc.

Posts (Resources)

Posts are the main form of dynamic data on the site. They can be used to post resources, documents, news post, etc. Resources are posts that have files attached to them. They are displayed on the Resources and Members area based on what category you assign them to.

To create a new Post

1. In the Dashboard, click Posts, Add New.
2. Click Add Media to attach a file or insert an image.
3. Edit your post in the WYSIWYG editor.
4. Assign an appropriate Category (see below).
5. You can Preview the post before publishing by clicking the Preview button.
6. When you are satisfied with the post, click Publish.

Important: To make a resource Private, you MUST both assign a Private Category (see below) AND check the Block this Post checkbox in the upper right corner of the Edit Post screen.

The Categories are configured as such:

- Private – Listed on the Members Area page and only viewable by registered users.
 - Committee Information
 - Industry
 - Interactions
 - Legal
 - NAIC/SVO
 - Topical Committee
 - Meeting Minutes
 - Organizational Documents
 - CSC Filings
 - PPIA Bylaws
 - Request for Feedback

- Public – Listed in Resources and Events pages.
 - Events
 - News
 - Resources

Events

To create a new Event

1. In the Dashboard, click Events, Add Event.
2. Add the name of the event.
3. Add any text, images, or other information you want in the WYSIWIG editor.
4. Add the Location Name and Address in the Where section.
5. Add the dates and times, if necessary, in the When section.
6. You can Preview the post before publishing by clicking the Preview button.
7. When you are satisfied with the post, click Publish.

To edit an Existing Event

1. In the Dashboard, click Events, Events.
2. Search for or filter the events to find the event you want to edit. Click the Title of the event to open it up.
3. Edit the fields that you want. Click Preview or Publish.

Members List and Contact Information (TablePress) (Style 1)

The Members List and Members Area Contact Information are maintained manually in a TablePress table.

To edit the TablePress table

1. In the Dashboard, click TablePress, All Tables.
2. Click the Table Name to open it up.
3. Scroll to the bottom and fill in the four fields.
4. Click Save Changes.

Members Area Contact Information (Style 2)

The Members Area Contact Information is a dynamic list based on registered users. If they do not show up on this list, they haven't registered as users of the site.

Menus

You can edit, add, or change menus by going to the Dashboard and clicking on Appearance, then Menus.

Users

There are only two User Roles in use on USPPIA.COM, the Administrator and the Subscriber. There are six roles available in WordPress. You can see the [Users] section in the guide for more information, if you wish.

- The Administrator role is somebody who has access to all the administration features within a single site.
- The Subscriber role is somebody who can manage their profile, view restricted content, and comment on posts.

As an Administrator, you are able to activate and deactivate users as well as edit their attributes.

To edit a User

1. Click on the User section in the Dashboard.
2. Search, scroll, or filter the list to find the user you want to edit. Click on the username.
3. Here you can edit the Role, first and last name, nickname, Display name, E-mail address, phone, and institution.

To Activate/Deactivate a User

1. Click on the User section in the Dashboard.
2. Search, scroll, or filter the list to find the user you want to activate or deactivate. If you are activating a new user, click on the Not Active filter at the top of the list.
3. Click on the username.
4. Quickly verify the first and last name are spelled and capitalized correctly, check the format of the phone number (XXX) XXX-XXXX; check the spelling of the institution.
5. Check the box to Activate or deactivate the user.
6. Click Update User.
7. The user will receive an email if being activated. They will NOT receive an email if they are deactivated.

Hosting and Google Analytics

USPPIA.COM is hosted with Dreamhost.com. Email and domain name registration is also handled through Dreamhost. In this section, you will find billing information, login information as well as FTP login information, if ever needed.

Webmail

Email sent to info@usppia.com is forwarded to any email address you choose.

Login and Check email

1. Go to www.dreamhost.com and click on Webmail in the upper right corner.
2. Email address is info@usppia.com
3. Password is FyJ@Fs7]D5\?f<k

Change where info@usppia.com is forwarded to

1. Go to www.dreamhost.com and click on Webmail in the upper right corner.
2. Email address is info@usppia.com
3. Password is FyJ@Fs7]D5\?f<k
4. Click on Manage Email in the upper left Toolbox.
5. In the Actions pane of info@usppia.com, click Edit.
6. Scroll down to “List all email addresses to forward to.”
7. Add full email addresses to forward to. One email address per line.
8. You can also change the Mailbox “Name”.
9. Click Save Changes to save.

FTP Login

Manage users

1. Go to www.dreamhost.com and click on Webmail in the upper right corner.
2. Email address is info@usppia.com
3. Password is FyJ@Fs7]D5\?f<k
4. Click on Manage Users in the upper left Toolbox.
5. You can edit the existing user and password or create a new FTP user here.

Using an FTP Client such as WinSCP or Filezilla

- File Protocol: SFTP
- Host name: carousel.dreamhost.com
- Port number: 22
- Username: danols16
- Password: FyJ@Fs7]D5\?f<k

Billing & Account

Hosting and Domain name registration are currently on a yearly plan.

- Happy Hosting - \$119.40/yearly – expires on 11/13/2015. Currently set to auto renew
- Domains registered – usppia.com - \$11.95/year Expires 11/13/2015 currently set to auto renew.

Modify Billing & Account information

1. Go to www.dreamhost.com and click on Webmail in the upper right corner.
2. Email address is info@usppia.com
3. Password is FyJ@Fs7]D5\?f<k
4. Click on Billing & Account in the Main Menu to the left.
5. Under Manage Account, click Credit Card AutoPay – Sign Up Now! To setup auto renewal for hosting.
6. Under Manage Account, under the Domains Registered section, click Edit under Actions.

7. Scroll to the bottom and select Modify WHOIS info for usppia.com. This is Owner and Billing information for the website.

Google Analytics

You can use Google Analytics to analyze traffic to the website.

To login to Google Analytics

1. Go to <http://www.google.com/analytics/>
2. Click Sign in.
3. Use usppia@gmail.com for the username and FyJ@Fs7]D5\?f<k for the password.