

The Role of the Firm Administrator

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Notes

As a firm Administrator, you should have 2 sets of login credentials –

- i) The Firm Login – which is a username and password that grants access to the firm profile and enables you to make changes on behalf of the firm. In theory this should have been passed to you by the Program Office if you are a new member or your predecessor, if you have taken over the role from someone else. You should keep this safe in order to pass it on to your successor. If the previous administrator has left your firm, we recommend that you update the password using the guidelines in the FAQ below
- ii) Your Personal Login – These are your personal login details and can be used for most of the routine activities associated with the Firm Admin Role.

Please also note that most fields which you would complete on the site include an Access Control setting which you can use to control the visibility of the information you post. In general, for maximum exposure, you will want to set this to 'Public' to ensure that even visitors who are not logged in to the site can see it, though there may be occasions where you do wish to limit the visibility to 'Logged in Users'. The 'Private' setting limits the visibility further, so that it can only be viewed by yourself and the Program Office.

1. Populating and Maintaining the Firm Profile

Although this is not the primary or most visible means by which your firm is represented on the site, it does carry some useful administrative data which will help the Program Office understand your firm's particular requirements and interactions with the FIX Protocol.

In order to edit the Firm Profile:

- Log in with the Firm Login
- Visit Dashboard (directly to the right of Home) > Profile
- Click 'Edit Profile' – at the bottom-left of the Logo Image
- Complete Fields as Required
- Save

In order to Update Profile Logo:

If your firm is a Premier Member you will need to contact the Program Office (fix@fixtrading.org) with the new logo, and they will update it with the Premier Member Badging on your behalf.

As a regular Member Firm you can update the logo yourself by visiting Dashboard > Profile as above, and clicking the 'Change Picture' link at the bottom right of the logo / image.

For the most attractive display, the best format for logos is 200x200 pixels – jpg or png files.

2. Populating and Maintaining the Member Listing

The Member Listing is the Primary vehicle for Promoting your firm on the site and is linked to directly on the list of Member Firms at

<http://www.fixtradingcommunity.org/pg/group-types/member-firm-groups-public>

Member listing are akin to Facebook 'Pages' in that other users can 'Follow' your firm's activities here. You can use this group to post news, links or other marketing collateral.

A. To Edit the Member Listing:

- Log in with the Firm Login
- Visit Dashboard (directly to the right of Home) > Your Member Listings
- Click on the Listing Displayed (there should be only 1)
- Click 'Edit' on the right of the screen
- Complete Fields as Required
- Hit 'Save'

Notes

- i) Do not Edit 'Tab Configuration' without guidance from the Program Office
- ii) There are 3 access and permission settings which should have the following recommended defaults –

- *Member listing following permissions:* **Open – any user may join**
- *Default Membership Contribution Status:* **View Only**
- *Who can see this member listing?:* **Public**

B. Posting Content in the Member Listing

As a Firm Administrator you can post the following types of content in your Member Listing by visiting the listing and using the 'Post new' Dropdown which appears in the 'Menu' Slideout on the left of the page. Please note you must be logged in with the Firm login to ensure that these posts are associated with your firm name, otherwise if you logged in as yourself you will appear as the poster.

- **Blog Posts** – Simple announcements about your firm
- **Bookmarks** – Links to external pages or other online resources

- **Discussion Topics** – Member Listing can be configured as venues for collaboration and discussion among users who have chosen to ‘follow’ the listing, if this is of interest then please contact the Program Office for further information
- **Documents and Media** – An ideal way to post documents or other marketing collateral which you would like to share with the FIX Trading Community. This would include White Papers, but in this case please do mention this to the Program Office who will be able to ensure the paper is included in the relevant hot topic section if applicable.
- **Pages** – Pages are essentially collaborative documents which can be edited by more than one user and can be organised in a tree structure.
- **Polls** – These are simple mechanisms which give users the ability to ‘vote’ on a multiple choice question which you can configure.

Each time you post something in your Member Listing the ‘followers’ of the listing will be notified automatically that you have included new material.

3. Populating and Maintaining the Employee Group.

Note:

The Employee Group is ONLY visible to its own composition or membership, so in theory only employees of your firm should be able to see it.

A. Managing the composition of the Employee Group

Managing the Employee Group is an important part of the firm administrator role since it is by virtue of their membership of this group that other firm employees receive the benefits associated with your firm’s membership. This would include certain site-based capabilities and access to content, along with the access to discount codes or free attendance at events.

When a user first signs up on the site, they are asked whether they are affiliated with a Member Firm, and are invited to associate themselves with their firm using a dropdown list. This dropdown also exists if they are already registered on the site, so all users can elect to change their affiliation through their profile also.

In both cases, when a new user registers, or when an existing user changes their affiliation, this generates an affiliation request which is received by you, the firm administrator. This comes in the form of an email notification which will direct you to a page where you can ACCEPT or DELETE the affiliation request. It is your role to establish whether the person claiming affiliation is a legitimate employee of your firm.

You can access the page listing affiliation requests for your firm at any time, whether you are logged in as the firm or in your own personal identity, by visiting Dashboard > Your Membership / Follow Requests. This produces a list of the names of people who made affiliation claims, and you can investigate them further by clicking on the avatars next to their name to view their profile and the information they have provided about themselves.

B. Posting Content in the Employee Group

In much the same way that you post content in the (Public) Member Listing in 2B above, you can also post content in the (Private) Employee Group. This content is only visible to the Membership of the Group, and as a Firm Admin you can use this channel to communicate with the other Employees within your firm who are registered users of the site, since by default they will receive notifications of any content you post.

4. Managing Products and Services

Notes

- (i) It is usually best to work with Products and Services logged in with the Firm Login.
- (ii) Products and Services appear on the side under the 'About' Tab at <http://www.fixtradingcommunity.org/pg/structure/products-and-services>
- (iii) Member Firms can add multiple products and services as required.

The list of Products and Services associated with your firm can be accessed via Dashboard > Your Products and Services. If no Products or Services have been configured this page will be blank and you can use the Slideout Menu on the left-hand side to create a new Product or Service.

Structurally they are very similar to both the Member Listing and Employee Groups. Other users on the site can 'Follow' your Product and the feature shares the functionality which allows you to post content and notify Followers when new content – such as product announcements or white papers – is posted.

Additionally Products and Services can be configured to allow discussion between the Followers so in theory this channel could be used as a support venue for questions related to the product. If this is of interest, please contact the Program Office (fix@fixtrading.org) for further information.

Since we are aware that different product teams may have specific requirements, or be spread across different sites, it is possible for the firm Admin to delegate specific responsibility and the management of different products to different individuals provided they are registered on the site and 'following' the Product. We explain this process in Section 5 below.

5. Delegating responsibilities for the above

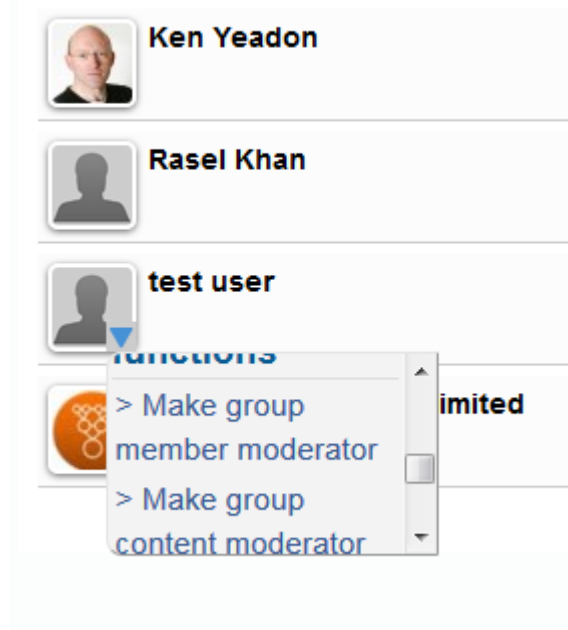
It may be the case that as the firm administrator you may wish to delegate some or all of the tasks above to other individuals, and this can be easily accomplished provided that those individuals are registered on the site.

If the individual is properly affiliated with your firm – as described in section 3A above – they will be automatically be included in the composition of the Employee Group, however they may need to actively 'Follow' the Member Listing or any relevant Products and Services.

Once they are a Member of or Following the Group you would like them to manage, they will appear in the list of Members Tab in each respective group. By rolling over the user's avatar you will see a

small triangle appear in the bottom right corner. Clicking on this will present a series of configuration options as shown in the screenshot below.

Members/Followers List (4)



The 'Group Function' options displayed are as follows and you simply need to click the option to assign the permission.

- **Make Group Administrator** — allows user to grant admin privileges to others. Essentially gives them access to this list when clicking on context menu in a Group Members Avatar.
- **Make Group Member Moderator** — allows users to approve members for the group if it is set to closed. Especially important for the Employee Group.
- **Make Group Profile Moderator** - allows user to edit the Group, update the description and other details.
- **Make Group Content Moderator** — allows user to add and edit content such as documents and blog posts

6. Acting as first point of contact for FIX Trading Community Communications

As firm Administrator, the FIX Trading Community may occasionally need to contact you on issues relating to your firm's Membership, subscription payments or upcoming events, and if any issues should arise with respect to firm employees and their activities within the community.

7. Coordinate inside the Firm on Product and Service promotions

In order to make the most of the promotional opportunities available on the FIX Trading Community website, we recommend that you take a look at the Products and Services which are listed for your firm to ensure that they are complete and up-to-date. You can access this list, logged in with the firm identity, by visiting Dashboard > Your Products and Services.

Since many firms will have different product groups within their organisation, you may find it useful to liaise with individual product teams to ensure that the content currently carried on the site is still accurate and up-to-date. New Products can be added using the instructions in section 4 above, and if there is enough interest internally, the product managers may wish to manage the content of their product pages themselves. In this case you can delegate the management of the products using the instructions in section 5.

8. Designate an alternative firm admin should you leave the firm

If you are leaving the firm or handing over the role, it would be useful if you could communicate this to the Program Office and ideally establish who will be replacing you in the role. If this is known please pass on the firm profile login credentials to the new administrator.

In either case, or if you have any questions, please contact the program office on fix@fixtrading.org.

In the event that you are leaving the firm, it would also be useful if you could update your personal profile to reflect your new affiliation. This will ensure that you continue to receive any benefits associated with your new firm.

Frequently Asked Questions

How do I Change my Password?

You can update your password by logging into the site and click Dashboard > Settings. If you are unable to log in at all, a password reset functionality is available through the Login Dialog. If this is unsuccessful, please contact the Program Office (fix@fixtrading.org).

How do I edit the Firm Profile?

See Section 1 Above.

What is the difference between the Firm Profile and the Firm Member Listing?

The Firm profile is principally an administrative profile of your firm, which carries data that is useful for the Program Office. The Member Listing is your most visible 'Public' identity, and the primary location in which you should post general information, documents and news about your firm.

Who should I contact if I encounter difficulties with my listing?

Please contact the Program Office at fix@fixtrading.org.

Is there any additional training collateral?

A selection of training videos are available from the 'Help' link in the footer of the page:
<http://www.fixtradingcommunity.org/pg/help-section>.

How do I update my Logo?

The logo in Firm the Profile can be edited using the instructions in 1. above. In the Member Listing, Employee Group and Products and services, the logos can be edited using the instructions in 2. above. You can also see a demonstration about how to update your logo on the training video page referred to in the above question.

<http://www.fixtradingcommunity.org/pg/help-section/help-for-companies#coreprofile>.

How can I delegate responsibility for the management of the employee group, member listing or Products and Services?

See section 5 above.

How can I automatically add my firm's new RSS feed to the FIX Trading Community Website.

This can be configured for you provided your firm has a suitable RSS Feed. Please contact the Program Office (fix@fixtrading.org) for further information.