



Forums Instructions

First, you will need to log into our website. (Be sure you are using your personal ID and not your firm ID)

<http://augtheexchange.site-ym.com/forums/Default.aspx>

or Navigate to Members – Community Forums and Discussions

Once you are on the Forums page, you can access the rules and guidelines for posting.

Under Community Discussions - We have the following topics:

- Portfolio Accounting Systems
- Trading and Trade Order Management Systems
- Operations
- Compliance
- Marketing
- Technology
- Firm Management
- Cybersecurity

To set up Your Forum Signature

Under Navigate to Members – Community Forums and Discussions

Click on My subscriptions & Settings

Add your name, title, and company

This will be how members can identify your posts

To Add a Discussion or Add a New Topic

Within the Forums and Discussions Section of the website

Click the hyperlink to enter a Community Discussion (Topic)

Click on New Topic to add a new thread

Click on the hyperlink to a topic (thread)

Click on Reply to add to the conversation

Enter a subject for your discussion and the details

Attach any pictures if appropriate

Click on Submit Post

Subscribe to a Topic or Thread

Topic: Main Forum Discussion topics, such as shown above

Thread: Topics of conversation within the main forum discussion

To receive updates any time a new thread is added to a topic:

Click on the hyperlink to the topic of your choice

Click on Forum Actions

Click on Subscribe to Instant Updates

To receive updates any time a new reply is added to a particular thread of conversation:

Subscribe to a thread

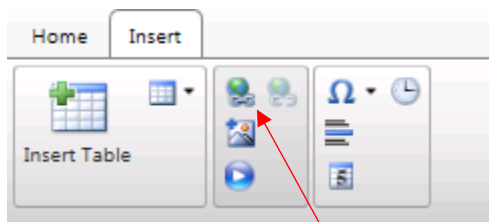
–to receive an update any time someone added to a specific thread

Click on Thread Actions

Click on Subscribe to Instant Updates

To Add a Hyperlink, Pictures, or Video to Your Text

Within the text editor – click on the Insert tab



Click on the hyperlink icon

Add the URL and Link Text (if desired)

Click OK

Thread Score

You can use the thumbs up or thumbs down for any thread to show whether you agree with the content.

Reporting a Thread

If you feel a member is abusing their privileges you can report it to the Moderator for that topic.

Click on the Report option at the top right and fill out the form. The form is pre-populated with a link to the original post.

Using a Quote

If you would like to quote a particular section within a thread

- while you are in the response
- choose the quote option at the top right.

This will then show the quoted portion prior to your response when posting.

Search Function

The search option can be used anywhere within the forums area of the website.

Type your subject into the Search Forums area at the top right and enter.

If you would like a more advanced search – you will have that option from your results page.