



www.wellsfound.org

Technical Documentation Including URLs, User IDs, Passwords

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Version 1.7

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Document Revisions

Date	Version Number	Document Changes
January 10, 2018 with additional minor updates on January 11, 2018 and January 16, 2018	1.0	Initial document
March 12, 2018	1.1	<ul style="list-style-type: none"> • Added chapter describing how the website uses Google Drive. • Added information about the “Embed Any Document” plugin and clarified verbiage around subscriptions to other premium plugins. • Corrected typos and font inconsistencies.
May 9, 2018	1.2	Added Chapter Error! Reference source not found. describing a known security vulnerability within the Media Library of WordPress and the plugin-based solution to that problem.
March 12, 2019	1.3	<p>Chapter 1</p> <ul style="list-style-type: none"> • Updated information about plugins (deleted references to plugins no longer used and added plugins activated since previous documentation). <p>Chapter 2</p> <ul style="list-style-type: none"> • Tested all user/password references and updated them as necessary. • Added cross-reference to Filezilla (file transfer software). • Updated information on renewal of domain name. <p>Chapter 10</p> <ul style="list-style-type: none"> • Added this chapter which describes steps to take whenever an individual either joins or leaves the Wells Foundation Board.
December 3, 2019	1.4	<ul style="list-style-type: none"> • Corrected ASO support code to show ██████████ • Updated information about the two annual renewal cycles for ASO as well as the issues that can arise in this process. • Updated list of WordPress plugins to reflect those that are currently active.
February 11, 2020	1.5	<ul style="list-style-type: none"> • Added Chapter 11 containing information about the new online donation page. Includes testing steps taken as part of this enhancement, processing capability, reporting and security features et al. • Updated list of plugins to add the Stripe plugin required for the online donation page.

Date	Version Number	Document Changes
March 24, 2020	1.6	<ul style="list-style-type: none">Deleted Chapter 8 and earlier reference to WordFence plugin. This Media Library add-on was never really working as anticipated.
June 18, 2020	1.7	<ul style="list-style-type: none">Updated chapter and various references to online payments to reflect that PayPal has replace Stripe as the donation transaction processor.Described problem and resolution with regard losing ability to generate Gmail confirmation notices to organizations applying for grants.Removed references to plugins that are no longer being used.

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1 Introduction and WordPress basics

1.1 Introduction

The purpose of this document is to provide a deeper dive into some points around the Wells Foundation website above and beyond that which is found in the user documentation that is found on a page under the “Board Members” menu. It basically formalizes and organizes the notes that the webmaster has routinely used and as such would allow a new administrator who has basic WordPress knowledge to come in and take over with relative ease.

1.2 Technical documentation

This document has been given the name **Technical Documentation Including URLs, User IDs, Passwords User/Board Member Documentation** to distinguish it from a separate document entitled **Technical Documentation Including URLs, User IDs, Passwords**. Both are stored under the passworded menu “Board Members (Private)”.

This new document:

- Is more technical in nature and as such **is not designed for general board member use**.
- Includes, among other things, detail about all the “under-the-hood” such as theme/child theme choice, plugins used, hosting provider accounts/user IDs/passwords (AUPs), cPanel AUPs, WordPress administrator AUPs, domain registrar AUPs, and the process for making database changes.
- Is password-protected. This password is available from the [webmaster](#) and two other board members.

1.3 Theme and best practices

The current website was developed using the **twentyseventeen** theme¹. At the time it was chosen it was the newest, most generic open source theme offered by the WordPress parent foundation. All best practices related to WordPress have been followed in the development and maintenance of the Wells site. These include:

- Creating a child theme and making changes only to that child theme².
- Assuring backups occur (this is managed through ASO).
- Minimizing the number of plugins.
- Choosing plugins with high user ratings and a large installed user base.

¹ A theme is “...a collection of files that work together to produce a graphical interface with an underlying unifying design for a weblog. These files are called template files. A theme modifies the way the site is displayed, without modifying the underlying software.” Article “Using Themes” https://codex.wordpress.org/Using_Themes.

² The whys and wherefores here require some lengthy explanation. Suffice it to say that correctly managing “parent” and “child” themes assures that any updates to *twentyseventeen* occur without a hitch while at the same time permitting users to customize the website as needed.

- Confirming that pages display correctly across multiple platforms and browsers.
- Optimizing and scaling images.
- Making the SSL-compatible (SSL being the “S” in HTTPS and the current standard for website security established by Google).
- Keeping core WordPress and plugin versions up-to-date.
- Using a favicon (the little icon that shows up next to our page title in the browser window).
- Giving permalinks (the links between pages, documents, and images that occur **within** the website) logical names.
- Including contact links.
- Applying additional security where appropriate (for example, on the board members pages).
- Posting documents in PDF format unless compelling reasons dictate otherwise.
- Removing Media Library items and un-installing plugins that are no longer needed.
- Auditing for broken links (both internal and external).

1.4 Plugins used on the Wells website

Plugin	Description	Wells-specific comment
Accordion Pro	Creates FAQ (frequently asked questions) sections on pages that can open and close thereby saving space.	Premium plugin; one-time charge of \$6/year. Because this is premium product we have an account with the vendor: <ul style="list-style-type: none"> • URL: https://wpshopmart.com/ • User: Oganovic • Password: Og1novic
Advanced Twenty Seventeen	Allows some customizing of that theme.	← As stated.
Akismet Anti-Spam	Protects site from spam.	Comes as part of WordPress load.
Child Themify	Creates child themes easily.	Accomplishes what is described footnote 2.

Plugin	Description	Wells-specific comment
Classic Editor	Enables the WordPress classic editor and the old-style Edit Post screen with TinyMCE, Meta Boxes, etc. Supports the older plugins that extend this screen.	Allow us to continue to edit pages as in the past while at the same time permitting access to the new Gutenberg features.
Draw Attention	Creates interactive images in WordPress.	Used to create link on the homepage to the page publicizing the annual concert Honoring Veterans.
Embed Any Document	Permits you upload and embed your documents on a WordPress website without any additional browser plugins like Flash or Acrobat reader.	Used for the pages storing documents from grant years 2016 and before that are stored on Google Drive.
Google Apps Login	Provides secure login for WordPress through users' Google Apps accounts.	Same as above.
Google Drive Embedder Premium	Browse for Google Drive documents and embed directly in your posts and pages. Extends the Google Apps Login plugin so no extra user authentication (or admin setup) is required.	Same as above. Premium plugin; subscription is 9.00/year.
Menu Image	Allows graphic images to appear as menu items in lieu of verbiage.	Used to emphasize the visibility of the "Donate" button.
Simple Membership Custom Messages	Customizes content protection messages.	Part of solution for board member menu security.
Simple WordPress Membership	Protects content within WordPress site.	Same as above.
Slick Sitemap	Shows the page and menu structure of the website.	Used to generate the menu structure for the "Board Members only" pages.

Plugin	Description	Wells-specific comment
Smush	Reduces image file sizes thereby allowing them to load more quickly on pages.	Standard product used on most WordPress sites.
TablePress	Embeds tables into pages.	Used on several pages that have “table-ized” or spreadsheet-like content and display.
WP Header image slider and carousel	Creates image slider.	Creates the moving grant recipient images on the home page.
WP Mail SMTP	This is an “under-the-hood” email manager.	Comes as part of WPForms plugin (see below).
WP Staging	Creates a staging clone site for testing & developing.	← As stated.
WPForms³	Provides drag & drop form builder to create WordPress forms.	<p>Premium plugin set (\$39.00/year). These provide the support processes related to the forms entry by applicant organization that are described in the user documentation.</p> <p>Because this is a premium product we have an account with the vendor:</p> <ul style="list-style-type: none"> • URL: https://wpforms.com/ • User: wellsfound • Password: Og1novic

³ See additional note about WPForms on the next page.

1.5 Special note about WPForms <> Gmail interface

Sometime between October 2019 and June 2020 something changed on the part of either Google (specifically, Gmail), WPForms, or (possibly) both. A protracted – and rather haphazardly documented – series of steps were required to re-activate the ability of WPForms to generate outgoing email confirmations to applicant groups using the Wells Grants Gmail account (wellsfoundgrants@gmail.com.)

What changed (and why) are unclear, but the remedial steps are described here: <https://wpmailsmtp.com/docs/how-to-set-up-the-gmail-mailer-in-wp-mail-smtp/>.

It is likewise unclear if this is a one-off change or if it will recur in the future. The end result of the steps taken to re-activate the email capability is that two additional data fields had to be generated by Google and then added to a field on a page that is generated when WPForms is loaded (navigation is WP Mail SMTP > Settings).

Here is a screenshot of that page showing the Google-generated fields entered::

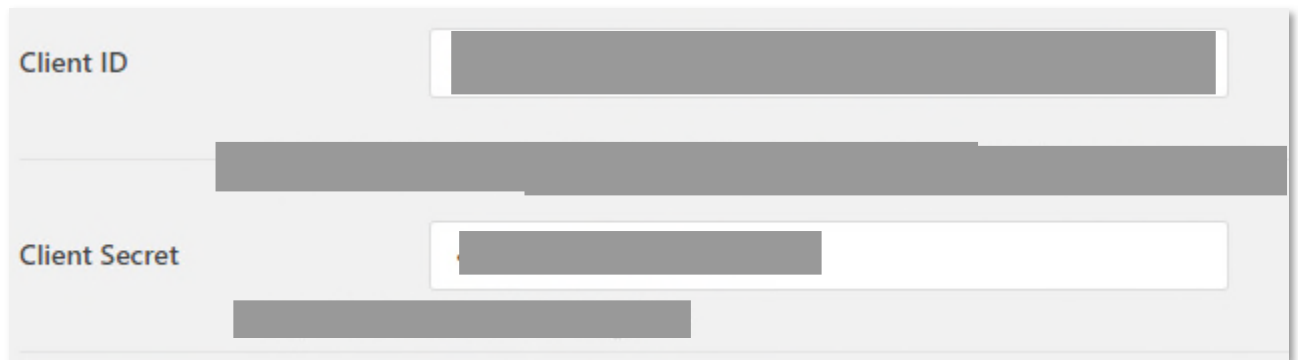
A screenshot of the WP Mail SMTP Settings page. The page has a light gray background. There are two main sections: 'Client ID' and 'Client Secret'. Each section has a text input field. The 'Client ID' field contains a long, grayed-out string. The 'Client Secret' field contains a shorter, grayed-out string. There are also some grayed-out areas above and below the input fields, likely representing other settings or labels that are obscured.

Figure 1-1

2 Hosting Provider – A Small Orange (ASO)

2.1 CAVEAT about URLs that follow

There is an elusive browser issue such that the URLs in the tables below may not work by clicking on the links. If that is the case, then copy and paste the links into your browser.

2.2 ASO client support area

In the table below the URL, user ID, and password bring you to the page that tells you everything about the Wells account with ASO. The support code is only needed for online chat support sessions.

URL	https://custome [REDACTED]
User ID	[REDACTED]
Password ID	[REDACTED]
Support code	[REDACTED]

ASO has two separate billing cycles:

- An **annual renewal** for the **basic service** – due on/about May 5 of each year.
- A separate renewal for what they consider the **SSL** “add-on” – due on/about September 15 of each year.

A problem in the past has been that ASO will send an email reminder, but the way these messages are formatted they may wind up in a junk mail folder. The result of this is that a separate cryptic email message may be triggered like the Figure 2-1 ahead informing you that the website has (temporarily) been shut down. Contacting ASO’s help desk and paying the fee corrects the problem.

⁴ This code changed some time in 2019. ASO may have sent a notice, but if so, it was it was missed for the same reason noted above – i.e., being interpreted as a junk mail message.

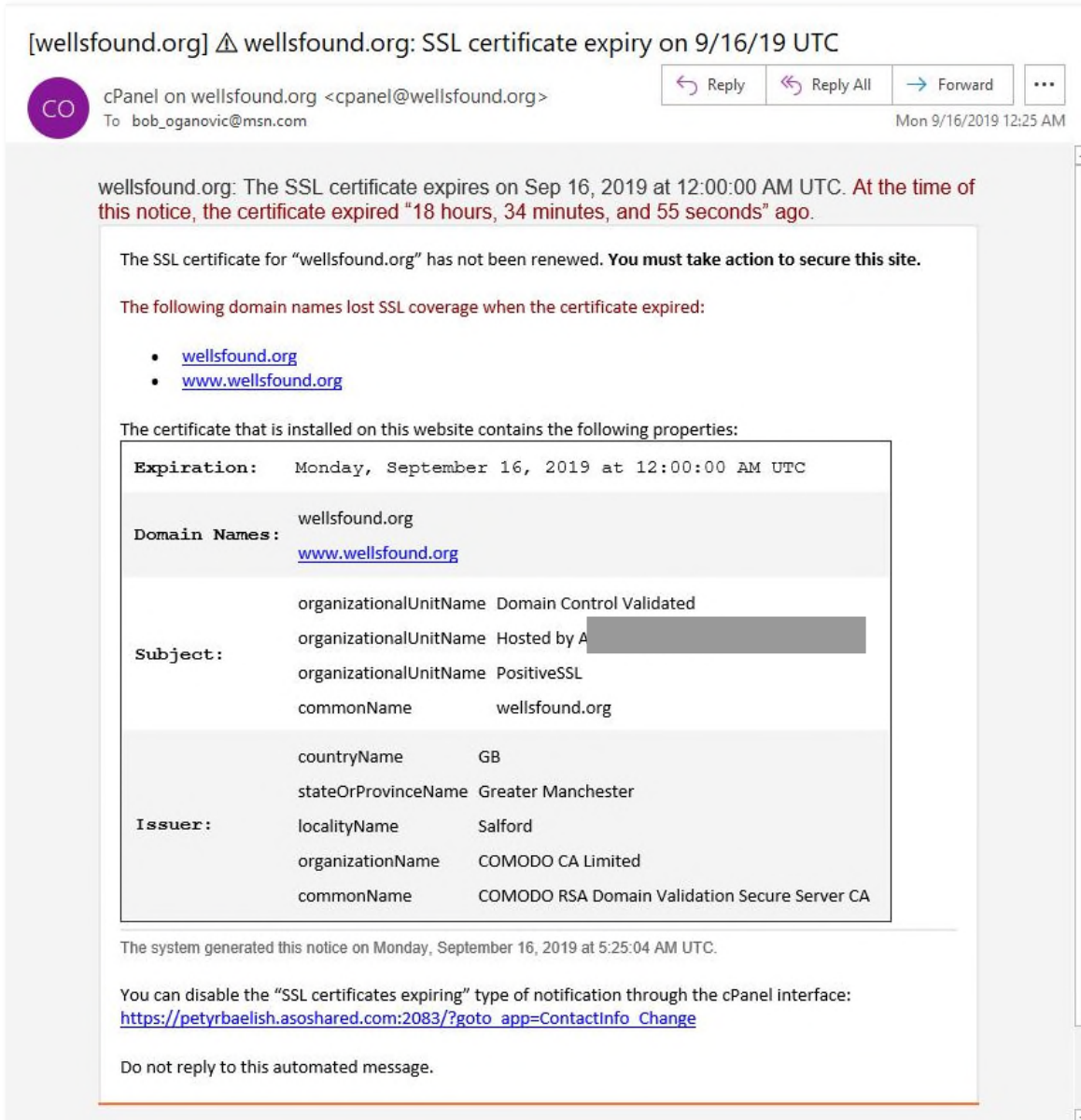


Figure 2-1

2.3 ASO cPanel login

cPanel is the standard web-based hosting control panel provided by ASO and other hosting providers. cPanel allows Wells to manage websites from a web-based interface. Most work in terms of maintaining and updating the website is not done on cPanel but, rather, is performed on the WordPress Administrator page discussed in section 3.1.

URL	https://[REDACTED]
User ID	[REDACTED]
Password	[REDACTED]

2.4 ASO Webmail – General

The Webmail account is a requirement of WordPress but as a practical matter it has no active use. Wells uses Gmail accounts for communication.

URL	https://p	
User ID	admin@	
Password		

2.5 Filezilla access

For a description of Filezilla and signon credentials see section **Error! Reference source not found.** ahead.

3 Accessing the WordPress Administrator site

3.1 Basic dashboard access

The dashboard is the first screen you see when you log into the administration area of any WordPress website. Notice below that the link for the administrator is simply the website URL with “/wp-admin” tacked on the end. In the words of one online training site:

The main idea of the dashboard is to give you a place where you can get an at-a-glance overview of what’s happening with your blog. You can catch up on news, view your draft posts, see who’s linking to you or how popular your content’s been, quickly put out a no-frills post, or check out and moderate your latest comments. It’s like a bird’s eye view of operations, from which you can swoop down into the particular details.⁵

URL	https://wells[REDACTED]
User ID	[REDACTED]
Password	[REDACTED]

3.2 More about “user role management”

In addition to members of the public, WordPress comes with an **internal** user role management system which defines what a specific user can and cannot do on the website. Out of the box when you install WordPress, there are five default user roles with **decreasing** (as the number gets higher) ability to do things on the website.

1. Administrator
2. Editor
3. Author
4. Contributor
5. Subscriber

3.3 User role management at Wells

For Wells only #1 (Administrator) has been implemented. If it is desired a second user ID with a clone Administrator role could be (but has not yet been) set up.

Roles #2 through #5 are designed for websites that are more oriented toward blogging and collecting content from multiple players wherein differing levels of review and editorial control are necessary.

⁵ See article entitled “Support” at <https://en.support.wordpress.com/dashboard/>.

4 Management of the Wells domain

4.1 Initial registration through DomainIT.com

The Wells domain was secured through a domain registrar company called DomainIT. Our account information is as follows:

URL	https://domainit.com
User ID	[REDACTED]
Password	[REDACTED]

According to information on this site the domain was established/purchased by [REDACTED]

[REDACTED] The domain was renewed for 10 years beginning May 19, 2019.

5 Google Drive Access

Google Drive is used to store archival documents that appear on the Board Member’s website page “Google Drive Documents 2010-2016”. The page has a “Questions and Answers” section at the bottom describing the rationale for, and steps taken toward, keeping these documents where they always resided rather than bringing them into the WordPress Media Library. Figure 5-1 shows the high-level folder structure where these documents reside:

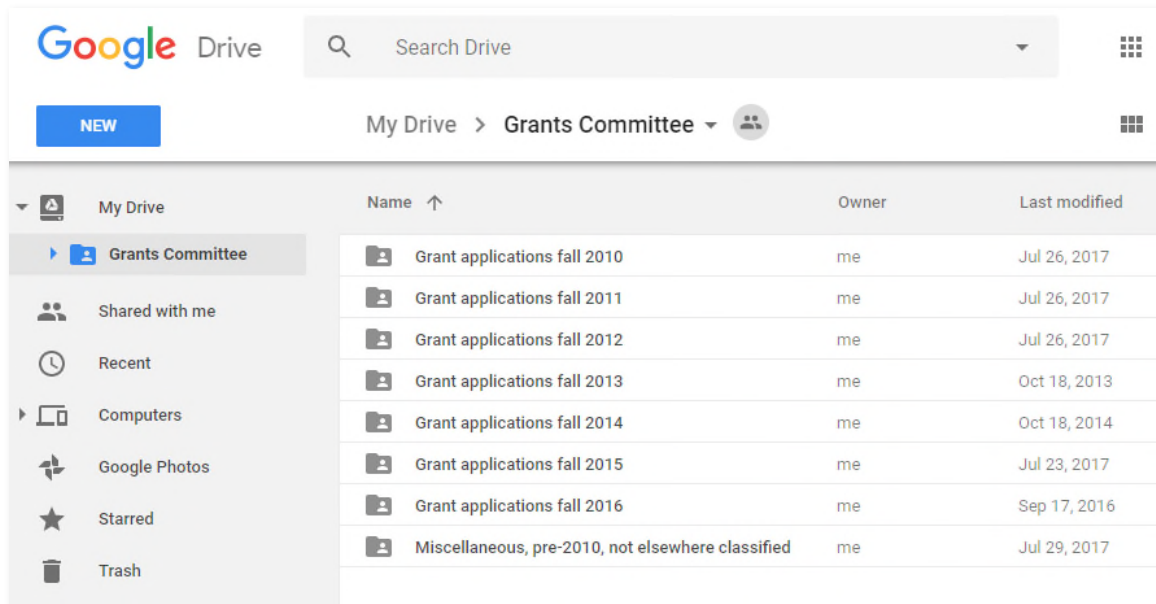


Figure 5-1

Security with respect to accessing these documents is enabled by the Google Drive Embedder Premium plugin described earlier.

Google Mail Address	[REDACTED]
Password	[REDACTED]

6 YouTube access

WordPress limits the size of media files (sound, video, images) that can be stored on the database. Therefore – especially in the case of videos – the best practice is to create links within WordPress pages to a separate YouTube account. On the Wells website this is the case for the video that appears on the page “Slide Show – Photos from the Wells Archive”.

URL	https://www.youtube.com/
User ID	[REDACTED]om
Password	[REDACTED]

7 Updating/correcting applicant records entered through WPForms

7.1 Background

As discussed elsewhere Wellsfound.org uses a form plugin called WPForms that allows organizations to apply online for grants. See screenshot below for how the data content looks once it has been entered. WPForms has worked very well for collecting user data but it has no means for correcting data that's already been entered and submitted. This might be caused by an applicant fat-fingering the entry on the form or, alternatively maybe there was turnover in the applicant organization and therefore a point-of-contact needs to be changed.

This is not a huge deal considering the relatively small number of records we are talking about, but it is something of an irritant when it comes to generating acceptance and rejection letters. That is because WPForms can export a CSV file with all the applicant organization data content. That CSV file is then brought into a Word mail merge letter. Any changes or corrections must be made at that point.

So, my “ask” of ██████████ of the WordPress User Group was, *“Is there a way I could correct the record within the underlying SQL database?”* A description of the solution follows.

7.2 Example

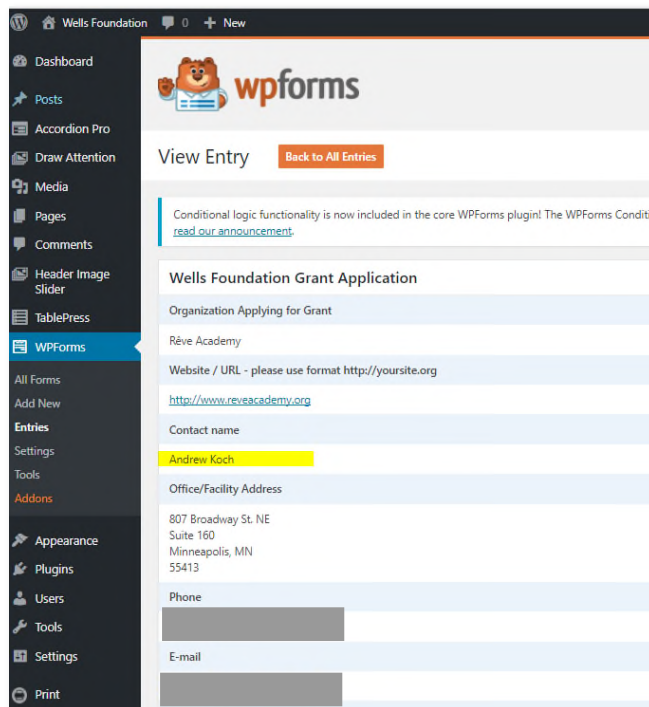


Figure 7-1

The contact person for the applicant Reve Academy (as shown above) has changed to Eliza Wright, e [redacted] rg (from her predecessor, Andrew Koch).

7.3 Steps to follow

7.3.1 Go into cPanel and update the table wells_wpforms_entry_fields

Access to cPanel is discussed in section 0. The **phpMyAdmin** page opens up the fields and values of the table **wells_wpforms_entry_fields**.⁶

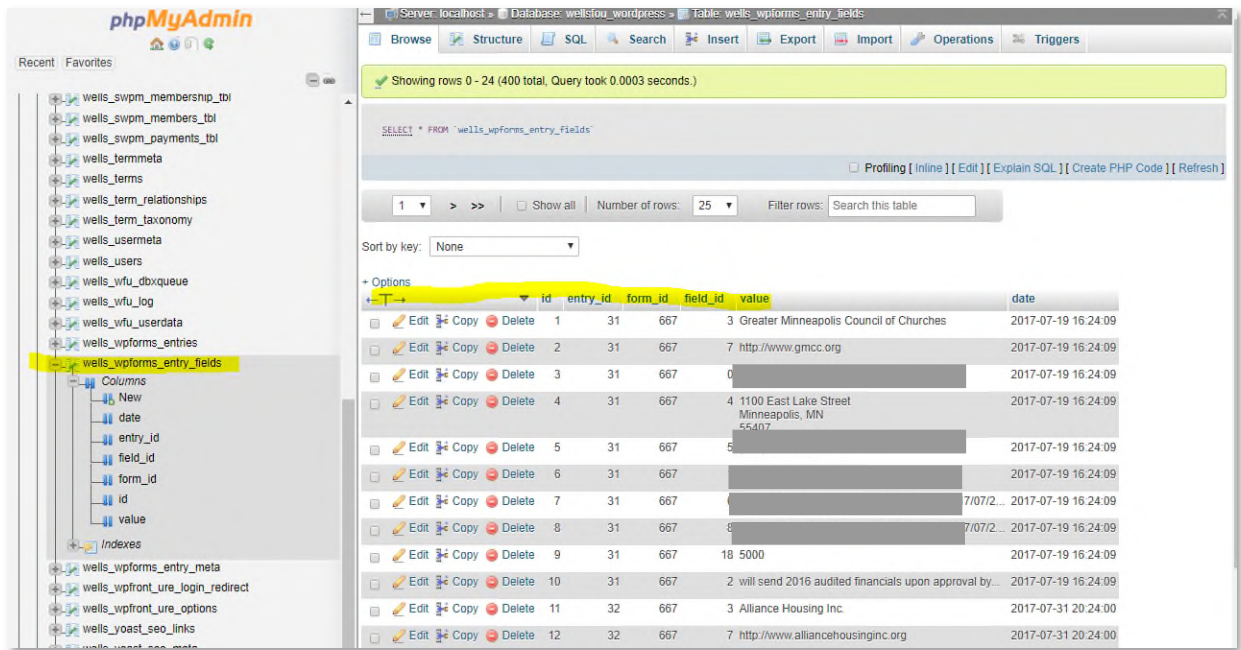


Figure 7-2

7.3.2 Find the record(s) that need(s) to be changed

Note here and in what follows that this applicant is identified by **entry_id** “48”.

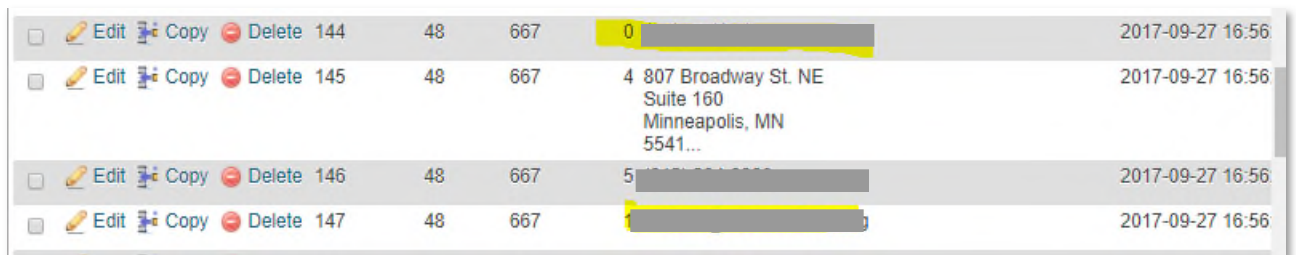


Figure 7-3

⁶ I am *guessing* this table is where the data entered by the applicant organization is stored as soon as they click on the WPForms submit button.

7.3.3 Double click on field(s) to be changed

Placing the cursor on the field automatically opens it up for editing.

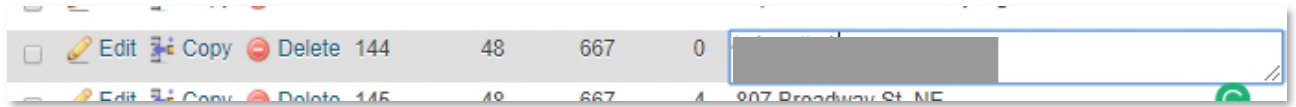


Figure 7-4

7.3.4 Similarly edit the wells_wpforms_entries table

There is another table – **wells_wpforms_entries** – that appears to **hold the data in the formatted manner displayed in Figure 7-1.**⁷ Updating the first table **does not appear to update the second.** Here is a screenshot updating the second table.

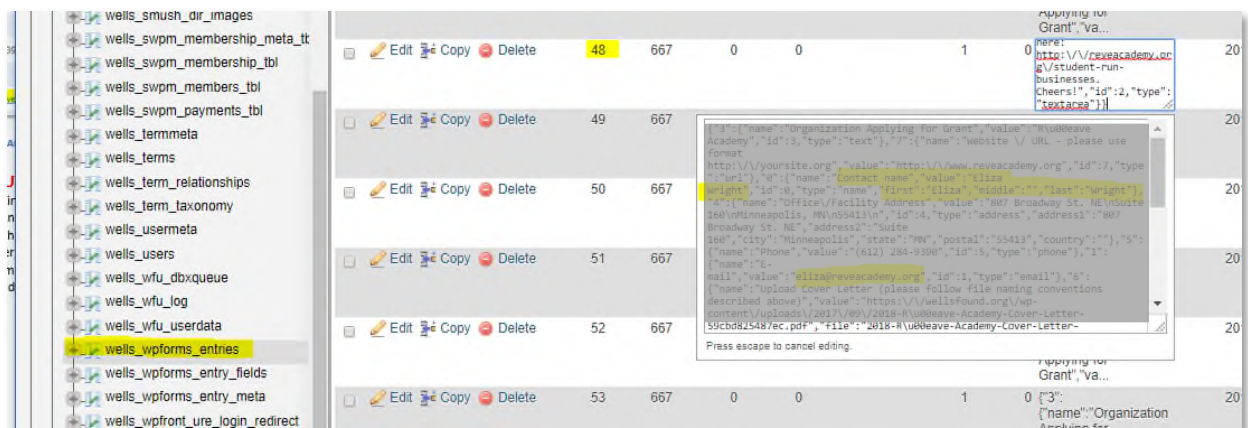
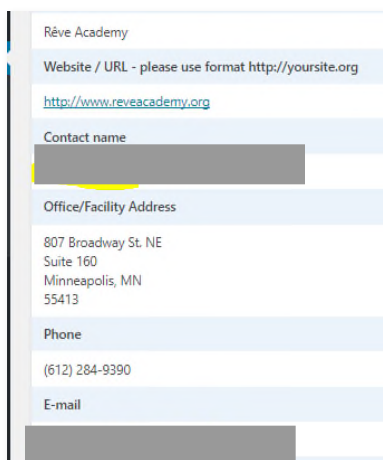


Figure 7-5

7.3.5 Confirm changes

The screen where the record is displayed now shows the correct information.



⁷ Here again I'm guessing.

8 Softaculous upgrade and maintenance process

8.1 What is Softaculous

Softaculous is an application installer that automates the initial installation of WordPress as well as subsequent upgrades of WordPress. Although it is a product separate from WordPress it ordinarily comes bundled with the WordPress through hosting providers like **A Small Orange** (see section 22 above).

8.2 Example of automatic upgrade

As suggested above anytime a new version of WordPress becomes available Softaculous will make that upgrade and sent a note to the webmaster email documenting what has occurred. In the Figure 8-1 the upgrade was to version 4.9.6.

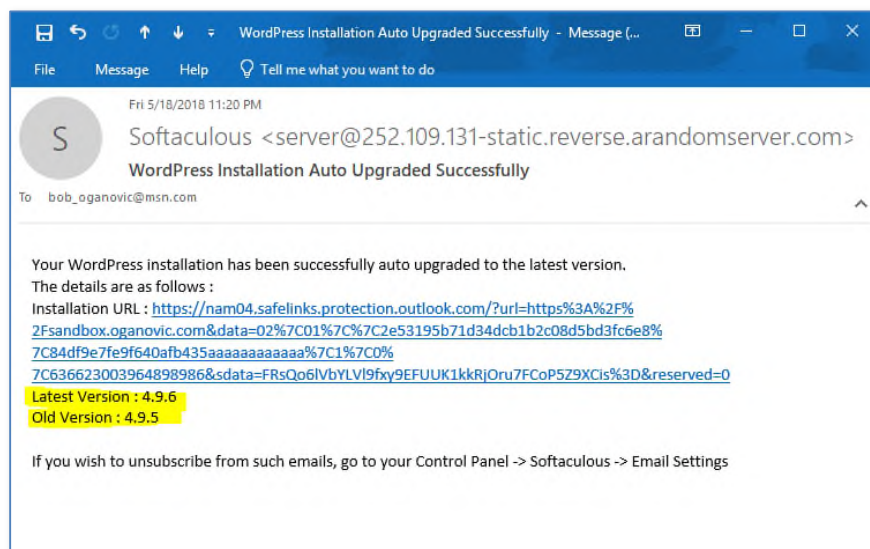


Figure 8-1

8.3 Requirement for manual intervention

When Softaculous automatically upgrades WordPress, it creates its own backup copy of the current Wells footprint. This is DIFFERENT FROM the ongoing backups performed by A [REDACTED] Owing to storage capacity limitations [REDACTED] e limits the number of the Softaculous backups that can be stored on the server. If that limit is hit Softaculous will generate a different email like that shown in Figure 8-2.

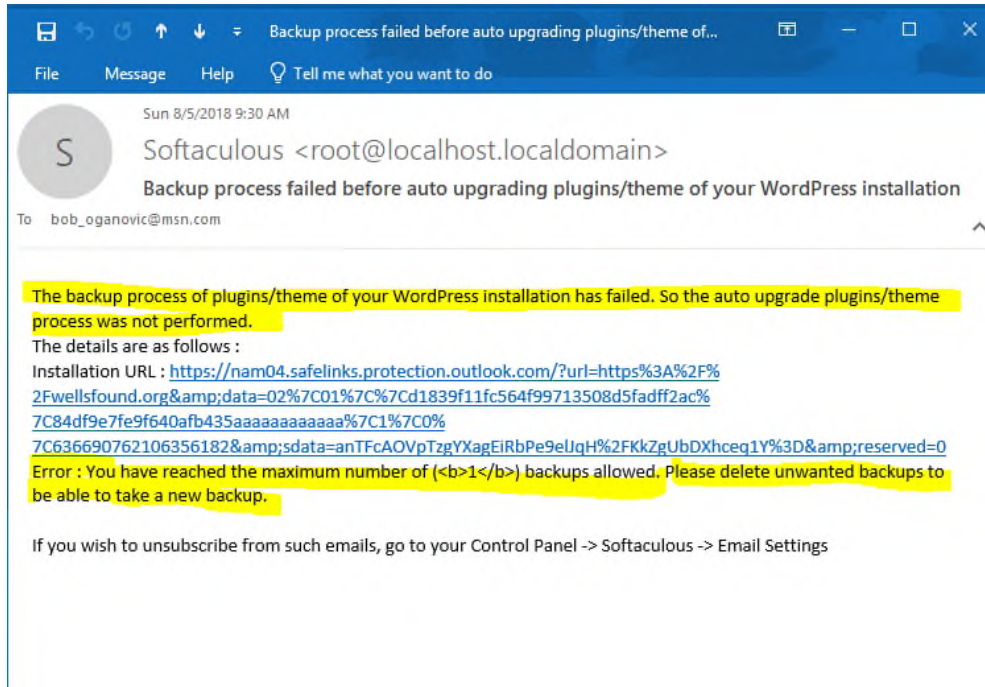


Figure 8-2

The “fix” for this is two-part. Go into cPanel, erase the files the old Softaculous backups (Figure 8-3) and then perform the upgrade manually.

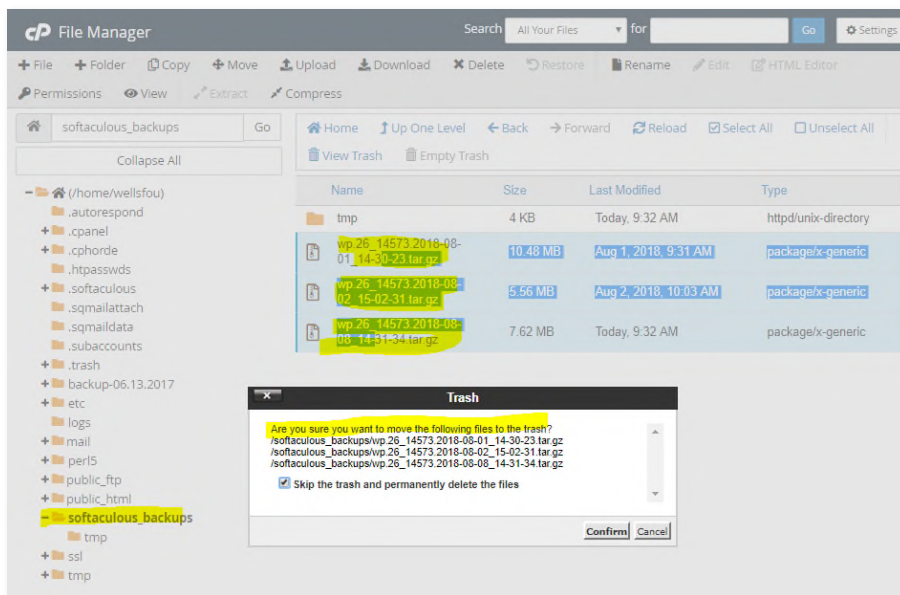


Figure 8-3

9 Maintenance checklist for incoming/outgoing board members

When an individual either joins or leaves the Wells Foundation Board (or is granted board member-level access) the following relatively straightforward steps are required. For a departing board member simply reverse these steps.

9.1 Simple WP Membership

This allows the individual to access pages on the Board Members (Private) menu. From the Administrator Dashboard navigate **WP Membership → Members → Add New** [button] and complete the following:

- Username = First Initial concatenated with Last Name
- Email
- Password = [REDACTED]
- Account Status = Active
- Membership Level = Board
- Access Starts = accept default (current date)
- Last Name and First Name
- Member Since = accept default (current date)
- Review and click Add New Member [button]

9.2 Photo and biography

To update this public page from the Administrator Dashboard, navigate **Pages → All Pages → Board of Directors**. From there:

- Crop/upload photo
- Input text of biography
- Add name to the list at the top
- Link the “jumps” from the photo and bio down the page to that list and vice versa
- Test/review and update page

9.3 Add contact information

From the Administrator Dashboard navigate **TablePress → All Tables → Wells board members...**. Create a new row and add in the respective information. Note that E-mail requires the address be embedded within some simple HTML characters. Also, update the Table Name and Description with the new date.

9.4 Notify the member

On the next page is sample verbiage for an email letting the person know they have been added. Obviously, this step can be skipped for board members who are departing.

Hello, _____. The Wells Foundation website consists of two areas:

- a. The [public-facing board members page](#) – this contains your photo and bio.
- b. The private “board members only” menu and accompanying pages. To access the material contained therein please follow these steps:
 1. Go to wellsfound.org.
 2. Click on **Board Members (Private)**.
 3. Click on **Board Member Login**.
 4. Sign in with user name _____; this is *not case sensitive*.
 5. Password for all board members and affiliates is the same – _____ e (*case sensitive*).

There’s a lot of stuff out there, but much of it is archival and only occasionally used. If you want a flyover of the content, click on the link at the bottom of the menu for **Website Documentation** then **End-user documentation**. It will open a PDF; the board member menu pages are discussed in chapter 1 (pages 4-9).

10 Online donations

From the menu at the top of the Wells home page there is now a choice to “**Donate Online**”.

10.1 PayPal

PayPal is a technology company whose software allows individuals and businesses to make and receive payments over the internet. Wells originally went with Stripe as the vendor of choice, but Stripe proved problematic due to their inability to eliminate bogus, bot-driven donation page access.

10.2 Signon for Wells PayPal dashboard

- URL: <https://www.paypal.com>
- User: [com](https://www.paypal.com)
- Password:

10.3 Setup steps taken for the online donation page and connection to PayPal

- 1) Changed the existing donation website page to reflect the new provider (PayPal).
- 2) Added the PayPal HTML to this page per the instructions found on <https://www.paypal.com/buttons/>. Note that unlike Stripe **this is NOT a 3rd-party plugin** but, rather, **code provided by PayPal**. As such, it is hoped this tighter coupling will eliminate the security gap noted above.
- 3) Configured the choices. There are multiple user feedback messages. After the donation page saves the transaction, the user:
 - a) Automatically is redirected to a “thank you” page that mimics an old-fashioned letter, complete with the Wells president’s signature.
 - b) Receives TWO (2) separate email confirmation of the donations, one from PayPal and one from Wells.

10.4 Other points

- 1) The messages described above can be tailored to the user and forwarded to anyone else, such as the treasurer and bookkeeper.
- 2) [redacted]’s phone number was also added as an alternate login so that she can reconcile the PayPal ledger to the Wells bank account, split out donations from fees charged, and generate any relevant reports.
- 3) After some initial troubleshooting consultations with the PayPal help desk three separate transactions were successfully processed.
- 4) The “donate button” now appears on every page. After experimenting with different approaches the cleanest/easiest way to accomplish this was to place the button image among the menu choices that appear at the top of each page. When the user clicks on it he/she is taken to the donation page, just as in the past. However, with the graphic it is more eye-catching