MM Platform Help guide: Managing members, friends and sponsors in the Making Music Platform

This guidance has been compiled by Making Music for use by Making Music members and forms part of the Making Music Platform service help guides. This guide specifically covers managing members, friends and sponsors in the Making Music Platform.

Before reading this, please ensure you have read our help guide on Getting Started with your Making Music Platform (https://www.makingmusic.org.uk/resource/getting-started-your-making-music-platform).

All of the Making Music Platform help guides and latest Platform News can be found on the MM Platform Service Hub page (https://www.makingmusic.org.uk/mm-platform-service-hub).

Contents

HOW DOES THE MEMBER DATABASE WORK

Understanding the Member Database

Although it is called the member database this is essentially where you would go to store information about your friends, supporters, basically anyone who has a relationship with your group. For the purposes of this set of help guides we will refer mainly to your members in the database but note that you can also include other individuals and even companies as well.

Making Music Platform is a sophisticated tool for managing your group's membership. Your MM Platform database can handle many different membership scenarios, so you can keep track of your members' unique situations.

To make this possible, the member database is divided into three parts:

1. Members. This database stores details that pertain to a person – their name, contact details, birthday etc.

2. Memberships. This database stores information about each member's official Membership with your group, such as their joining date and Membership type.

3. Participations. This database stores information about each member's activities with your group's performing Ensemble(s), such as the member's voice part. Each member can have as many Participations as your group has performing Ensembles. E.g. if your group has a main choir and a chamber choir, a member can have a Participation with each choir and those Participations will each hold information about the member's relationship with the ensemble.

We've created a graphic to illustrate the relationship between a member, their Membership and Participations with your group

## Member Database Administration

Administration of members begins on the Member List page. Reach this page via the Member Database icon on the main Members page. The Member List page lists various subsets of the members of your organisation. A series of tabs is displayed across the top of the page. Each tab represents a "member grouping" - a subset of your entire member database.

In the image below, the tab called Regular Members (a member grouping, a subset of members) is currently highlighted, meaning that the page currently lists all members in that particular subset. The other tabs (member groupings, subsets) available on that page are Regular Members, Active Singers, and Members and Helpers. Each can be clicked on to show *that* subset of members.

If you are unsure as to how a particular subset of members is derived, you can click on the "update" icon immediately to the right of the name of each tab. The page you are taken to will list all the criteria of that particular member grouping.

Clicking on the More... tab takes you to the Member Groupings page, where *all* your member groupings are listed (not just the ones designated to display on the Member List page).
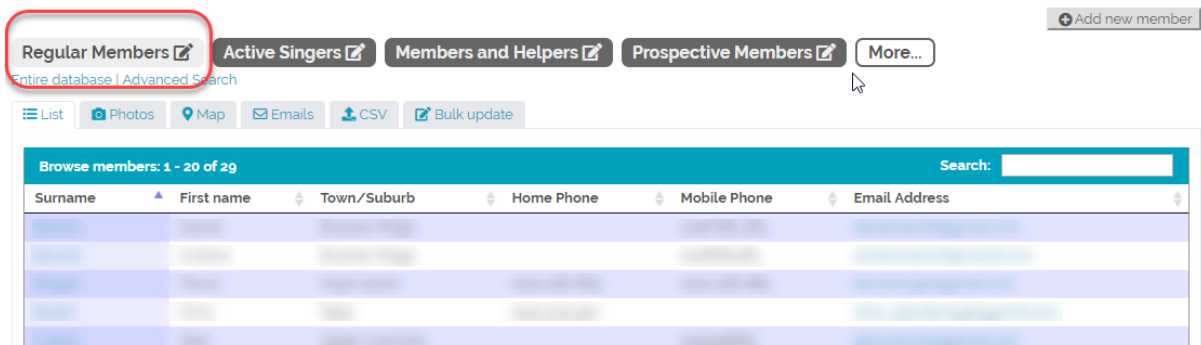
On this page, it is also possible to list the *entire* member database, which may include former members, or people that are not members at all, such as suppliers, supporters, helpers, etc. Simply click the Entire database link in the top-left corner of the Member List page, circled in the image below...
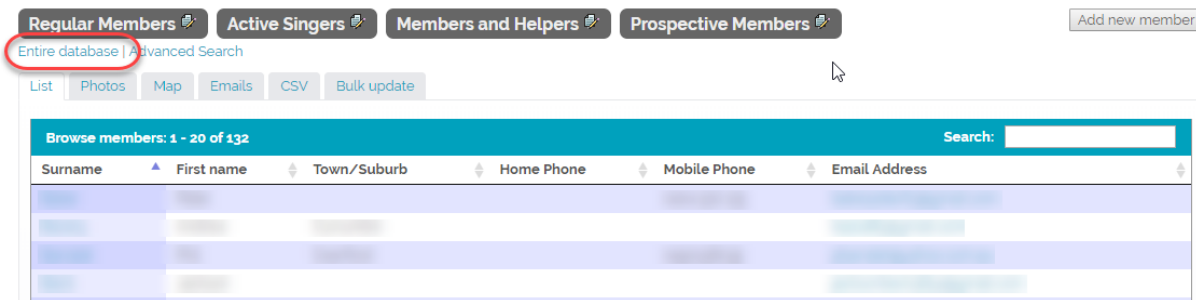
The various headings below the member grouping tabs can be clicked on to present the current subset of members in different ways...

- List - Members in this subset are presented in a simple list format, showing their most useful details (their name, phone number, email address, etc). If you want to view *all* the details of a member (their profile page), click the member's last name. If you're looking for a specific member, and they are not immediately visible, you have a couple of options for finding them...

    o   Click the First / Prev / Next / Last buttons (or any of the numbered buttons) in the bottom-right corner of the list to view more of the members in this grouping

    o   Use the Search box in the top-right corner of the list to search for a member by their first name, last name, email address, or phone number.

- Photos - Members in this subset are presented as a photo gallery, each photo coming from the member's profile page (specifically their membership record). Clicking on their name or photo takes you to the member's profile page.

- Map - The home addresses of all members in the subset are plotted on an interactive map. If a member doesn't have a home address in their profile, nothing is shown for them. The location of your regular meeting venue (e.g. your rehearsal venue) is also shown on the map, with a different coloured pin.

- Emails - The email addresses of all members in the subset that have one are listed in several ways, for easily emailing all members in bulk. However, this tab is generally not used very often. There are more convenient ways to email all members in a subset, such as creating a mailing list for them.

- CSV - Export the complete details (not just what's shown on this page) of all members in the subset to a CSV file. A CSV file can be opened in Microsoft Excel or similar programmes.

- Bulk update - This facility is generally only used when you're setting up your Making Music Platform for the first time. It allows you to adjust the membership and participation details of all member in the subset in one action.

Searching for a member

There are a number of ways to search for a specific member from your database:

1. In the top-left corner of every page is a member quick-search box, shown here...
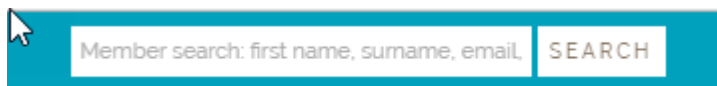
This searches the *entire* member database. Type a member name (or part thereof) or an email address or phone number into this field, and then click the Search button. You'll be taken to the Member List page, with any matching members displayed.

2. On the Member List page, there is also an Advanced search option, which allows you to search for members by *criteria*, similar to the criteria used in member groupings.. To access this, click on the Advanced Search link at the top of the Member List page (circled below)...
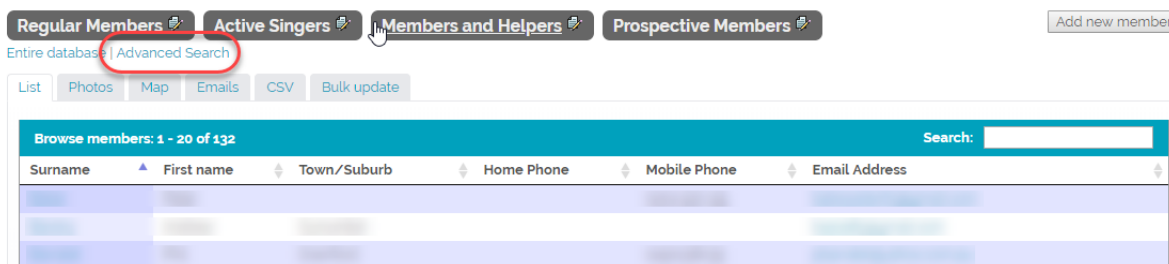
This will display the Advanced Member Search page, shown here..

This gives the option of searching for members by various criteria. Enter the criteria you wish to search by, then click the List button at the foot of the page to display the members that matched the criteria you selected, as follows...

The tab in the top-left corner (circled, above) indicates that the members listed are the results of a search. Additionally, when a search is based on criteria from the Advanced Search page, a "Save" icon is visible immediately to the right of the word Search Results, which allows the search criteria you entered to be saved as a new member grouping. Clicking on this "Save" icon displays a Member Grouping details page that is already pre-populated with the search criteria you used in your advanced search. All that is required, in order to create a new member grouping with these criteria, is to add a Name for the new grouping, and then click Save at the foot of the page.

Each Member's profile page

All details kept for a member are available via the member's *profile page*. The information on a member's profile page is in several sections...

The top half of the page shows the member's *personal* details - everything about the member as a person (independent of their relationship to your club/chapter/organisation)...
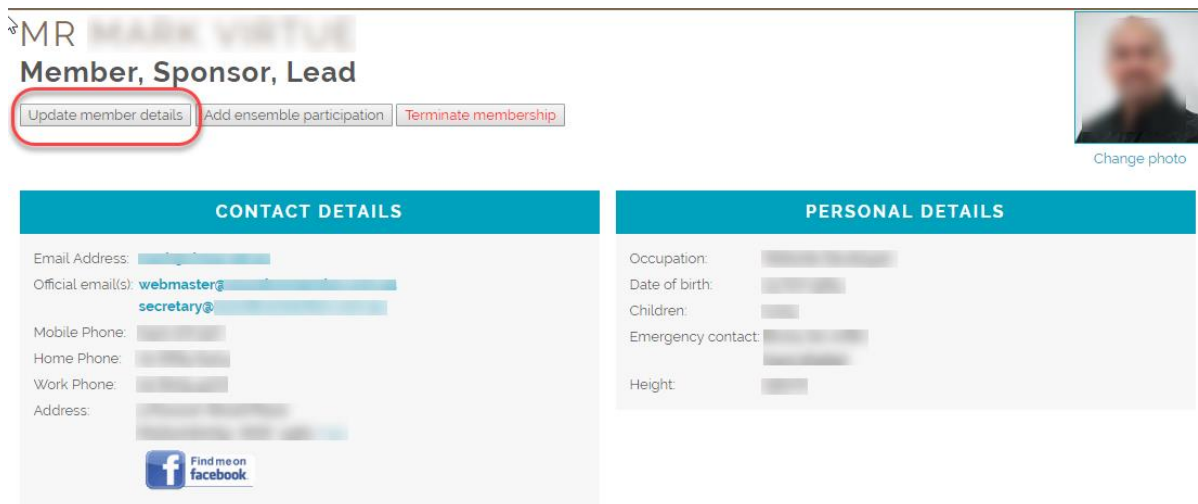
An administrator (or the member themselves) can update the member's personal details by clicking the Update member details button (circled above) below the member's name. This displays the Member Details page for the member. All Member details (Personal, Contact and Sponsor details) can be updated from that page.

The bottom half of the page contains all the information about the member's relationship to your organisation. This includes their *membership* details (their relationship to your club/chapter/etc), their (active) *participation* details (any active relationship they may have to your various ensembles), and their *website login* details (their relationship to your website, including their access privileges). Each set of information is presented in a separate tab, as follows...
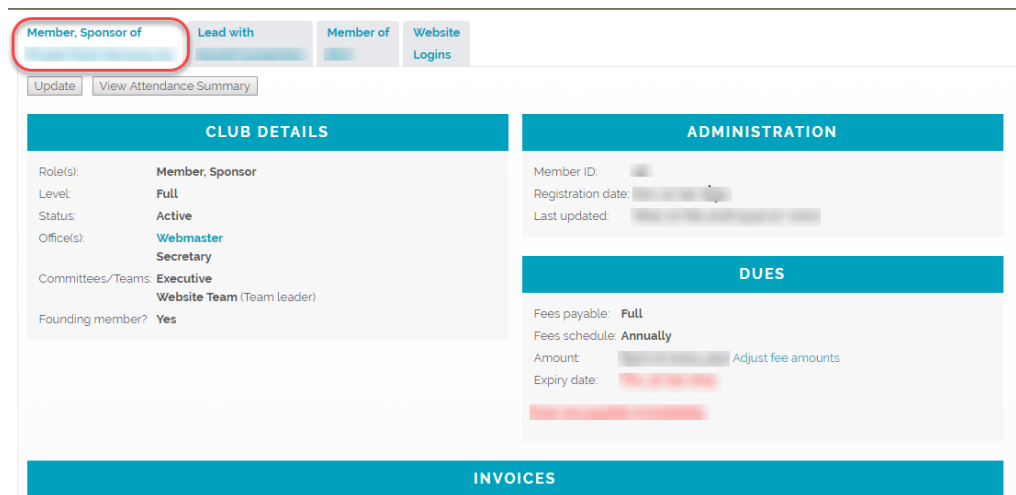
Each of these tabs contains its own Update button, allowing you to change that particular set of details.

If this member participates in one of your ensembles, and there is no tab present on this page containing the details of that participation, then you can create a new participation for the member for that ensemble, via the Add ensemble participation button below the member's name at the top of the page (circled, below)...
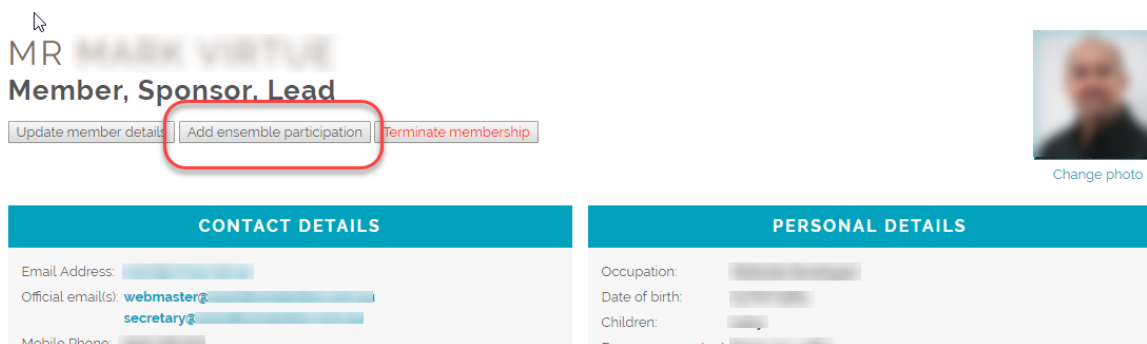

How to add an individual to the database

As mentioned previously in the understanding the member database section of the help guides, although it is called the member database this is essentially where you would go to store information about your friends, supporters, basically anyone who has a relationship with your group. For the purposes of this help guide we will refer mainly to how you can add a member to the database, but note that you are able follow the same process and select that the individual will be a friend/supporter of your group instead.

If you have a large number of members then as part of the initial set up of your platform Making Music can import your members (only your members as part of the initial set up) into your platform for you. Email us on platform@makingmusic.org.uk if you would like us to import your members into the Platform for you. However, if you only have a few members or you would prefer to add your members to the Platform manually then you can also do that.

To manually add an individual to the database, navigate to your Member Database (otherwise known as your Member List). From here click the '+ Add new member' button in the upper right-hand corner:
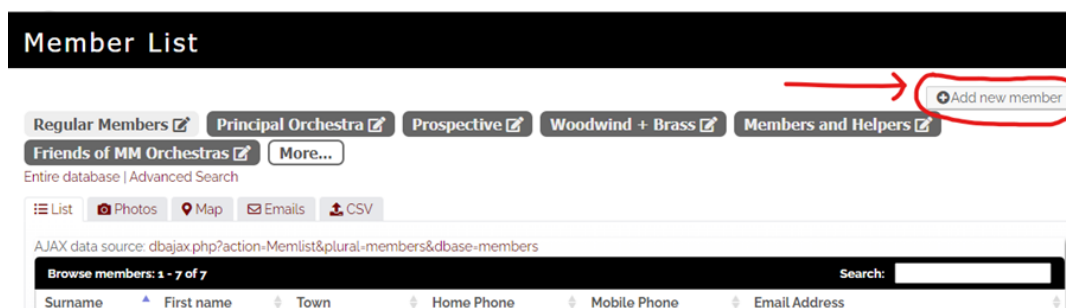
Upon clicking this button, you will be prompted to 'Search for Member' to see if they are already in the Database somewhere.

Personal Information

If they are not, you will be prompted to 'Create new member' – click this, and you will be able to enter all Personal/Contact/Sponsor details relevant to that member.

Membership Information

Once this is completed, you will be prompted to 'Create membership' for that Member. This membership links the Member to your group and specifies *how* that Member fits into your group. For example, are they a full active member of your group, or are they an inactive honorary friend of the group? If the person you are adding is a friend/supporter of the group then you can select that option here.

Participation Information

Once you have filled in the relevant information for the membership section, you can move on to the 'Participations' section. You will be prompted to 'Create new participation'. This will detail their connection to a particular ensemble(s), and their Section (such as Viola, or Baritone). If you are adding friends/supporters then you usually won't need to create a participation link to your group.

Login Information

Finally, you will have the option to create a unique Login for that member. This allows you to create a Username for that Member, as well as a randomly generated password – both of which can be emailed to the member. Crucially, this step also allows you to set the Member's permission level for the platform which determines what they can access on the Platform. More details on how the website logins work can be found in our Member logins helpguide.

Deleting a Member or Terminating their Membership

When a member leaves your group, you naturally want to remove them from the list of active members in the database. You may believe that "deleting" the member is the best choice here, but we don't recommend that. Instead, we recommend that you "terminate their membership", which leaves them in the system but marks them as inactive/former and removes their ability to log into the website, amongst other things. Deleting a member entirely is more drastic - all historical record of the member's existence are removed from your site, including their attendance records, membership invoices, records of purchases or downloads of copyrighted files, etc. This could interfere with the accuracy of those historical records.

There are exceptions to this, of course. If the member was added by accident or is a "test" member, etc, then it's perfectly safe and reasonable to delete them.

Terminating or deleting a member is done from the member's profile page, via buttons at the top of the page:

Member, Baritone

[✎ Update member details] [⊕ Add ensemble participation] [👤✗ Terminate membership] [🗑 Delete member]

To terminate a membership, click on the Terminate Membership button. It is safe to do this at any time, even if you are simply wondering what the button does. This is because the termination doesn't happen immediately that you click the button. Instead, you are taken to a page that shows you what the system *would* do if you were to continue with the termination...

TERMINATE MEMBERSHIP

For

Club membership:	☑	- change from **Active** to **Former**, set **Date left**
Ensemble participation:	☑	- change from **Active** to **Inactive**, set **Date left** to
Positions:	☑	Chorus Administration: Webmaster - *Remove from position*
	☑	Executive: Secretary - *Remove from position*
Committees/teams:	☑	Executive - *Remove from committee/team*
	☑	Website Team - *Remove from committee/team*
Website Logins:	☑	- *Delete*

Each action listed has an associated tickbox, and all actions are ticked by default. If you don't believe that one of those actions should be taken during the termination process, then simply untick the box before you click the Terminate Membership button at the bottom of that page.

If you decide that you really do want to permanently delete a member from your system, then click the Delete member button at the top of the page. You'll be taken to another page that outlines the reasons why we don't recommend that you delete members...

IMPORTANT WARNING - PLEASE READ CAREFULLY

Deleting a member will not just delete the member's personal, chapter, and ensemble details from the system, it will also remove *all* historical records of the member's existence, including any

- attendance records
- membership invoices
- merchandise orders, ticket purchases, etc
- assessment attempts
- suggestions
- library item loans
- event program items
- records of downloads of copyrighted files
- *...and more*

You will no longer have the member's personal contact details on file, meaning you may no longer be able to contact this person in future.

Instead, it is strongly recommended that you **terminate their membership**. This keeps the member's details in the system, along with all their historical records, but marks them as a **former/inactive** member, so they no longer appear in most of the member lists on the website.

Note that you can safely click either of the buttons below without fear of causing problems, because both buttons first show you what will be done, and then prompt you to confirm the action.

Terminate membership - **Recommended**

Delete member - *NOT recommended*

On that page, you can confirm that you really do want to delete the member or opt to simply terminate their membership instead.

Notes:

- Unfortunately, the Delete Member button is not available on the websites of chapters/clubs that are part of a parent body that also uses Making Music Platform. Such parent bodies include BHA, BHNZ, SABA, various SAI regions, etc. The reason is that the parent body *also* needs access to the details of the member you want to delete, so no one chapter/club is allowed to remove a member. Having said that, if the member was created in error, or is a test member, you can contact us at platform@makingmusic.org.uk, and we'll delete it for you.

- The Delete Member button is only visible to users with "Webmaster" access. Someone with "Data Administration Access" will not see the button.

How to add Sponsors

There is a page in the public-facing part of the website called Sponsors. The sponsors listed on this page (if there are any) actually come from the *members* database (remembering that the members database can contain other people than just regular members - including, in this case, sponsors).

So rather than edit the contents of this page directly, the best way to get sponsors to appear on this page is to do the following...

1. If the sponsor is not a member of your group, then you need to add them to the member database first. This is done in the usual way that you would add *any* member. If the sponsor is a company, then the first name and surname that you enter would correspond to the main contact point for your group within that company

2. Locate the member in the member database, and click their surname to view the page that contains their profile

3. Click the Update member details button

4. Click the Sponsor tab

5. Enter the company name, website, logo, contact details, and some advertising copy in the main box at the bottom.

6. Click Save at the bottom

The next step is to make sure that the member's membership specifies a Type/role of Sponsor To do this, proceed as follows..

1. Across the middle of their Profile page, there is a series of clickable tabs; the one displayed by default is the member's *membership* details. Click on the Update button at the top-left corner of this tab.

2. On the Membership Details page, scroll down to the Type/role heading, and check the Sponsor tickbox. If that person is also a member, you can also tick the box called Member

3. Click Save at the bottom

The details you entered on the Sponsor tab of the member details page will now be automatically formatted to appear on the Sponsors page.

USING MEMBER GROUPINGS TO CREATE SUB GROUPS WITHIN THE DATABASE

What is a member grouping?

A member grouping is a set of individuals from your member database that all share particular attributes. For this guidance on member groupings, we are going to refer specifically to members however, please note that member groupings can also be used to categorise your friends/supporters/sponsors basically anyone who exists in your member database.

Member Groupings are a powerful tool for categorising members – and there are many ways to categorise your members. The criteria for each Member Grouping is decided by you. For example, you may want to create a Member Grouping that lists all your Full Members, or those that play in the String Section of your orchestra. Or you may want to group all the Student Tenors in your choir. In essence, it is a way to create pre-set filters so that you can always quickly find Members of a particular type. These Member Groupings will appear in as clickable filters in the Member Database.

What else can Member Groupings be used for?

Member Groupings are a core building block of your Platform's functionality. Many of the settings and tools built into the Platform use Member Groupings to determine to which Members many of the tools are applied. For example, you may want to track attendance only for your 'Active Members', or only allow 'Prospective Members' to be assessed on songs.

Further to this, Member Groupings can be used to inform Mailing Lists (for example, a Tenors Mailing List), or as a way to filter your Financial Reports (for example, to see which Wind Players have paid their dues!).

The Member Groupings page

All your Making Music Platform member groupings can be viewed on and administered from, the Member Groupings page. To access this page, proceed as follows...

1. Log into your website as an administrator

2. Click on the Admin link at the top-right corner of the page to take you to the Admin Dashboard.

3. Scroll down to the Members section, and click on the View Member Groupings link to the right of this in the Admin Pages column. This displays the Member Grouping page, the main body of which is shown below...

Member grouping Name	Used for	Shown on List page	Members	
Regular Members	DEFAULT - regular, active members ➕ Create mailing list	✓	29 [List]	✏️🗑️
Active Singers	Members that can be assessed on songs Members that we track attendance for Members that can stand on the risers ➕ Create mailing list	✓	27 [List]	✏️🗑️
Members and Helpers	Members that should appear on the Birthday calendar Members that can hold a position or be part of a team Members that should have a login into this website Members that should receive broadcast SMSs ➕ Create mailing list	✓	3[List]	✏️🗑️
Prospective Members	➕ Create mailing list	✓	5 [List]	✏️🗑️
Baritones on Mailing List	Mailing list: Baritones mailing list		6 [List]	✏️🗑️
Basses on Mailing List	Mailing list: Basses mailing list		11 [List]	✏️🗑️
Financial members	Members that pay dues (financial members) ➕ Create mailing list		27 [List]	✏️🗑️
Leads on Mailing List	Mailing list: Leads mailing list		5 [List]	✏️🗑️
Provisional members	➕ Create mailing list		0 [List]	✏️🗑️
Regular Members on Mailing List	Mailing list: Members mailing list		29 [List]	✏️🗑️

The columns in this table are as follows:

Member Grouping name - The names of your member groupings. The groupings displayed as a dark-grey button are the groupings that appear as tabs on the Member List page.

Used for - this column shows where, if anywhere, this member grouping is used to define a subset of members in the system. For example, in the screenshot above we can see that the Active Singers member grouping is used to specify the following subsets of members: Members that can be assessed on songs, Members that we track attendance for, and Members that can stand on the risers. Changing which member grouping is used for each subset is done on the Website Setup and Configuration page (the section below called Configuring Member Groupings describes how to do this). Additionally, this Used for column specifies a link to any mailing list(s) that are based on each member grouping. If there is none, the Create mailing list link is displayed to allow you to create one.

Shown on List page - a check in this column means that the member grouping is displayed as a tab on the Member List page.

Members - shows the number of members in this member grouping, and gives the opportunity to list those members by clicking on the [List] link. The list of members is displayed on the Member List page.

The final column on the right provides options allowing you to update the details of each member grouping, or delete them.
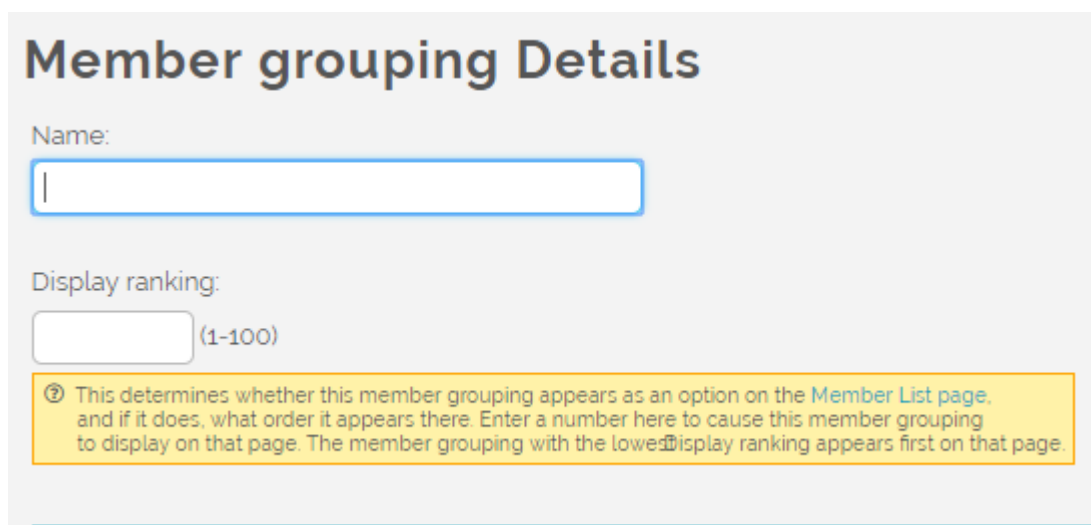
Adding a Member Grouping

A member grouping is a named set of criteria for selecting members from the member database. Any time you want a new member grouping, you need to specify these criteria and enter a name for them. To do so, click on the Add new grouping button at the top-right of the Member Grouping page (circled below)...
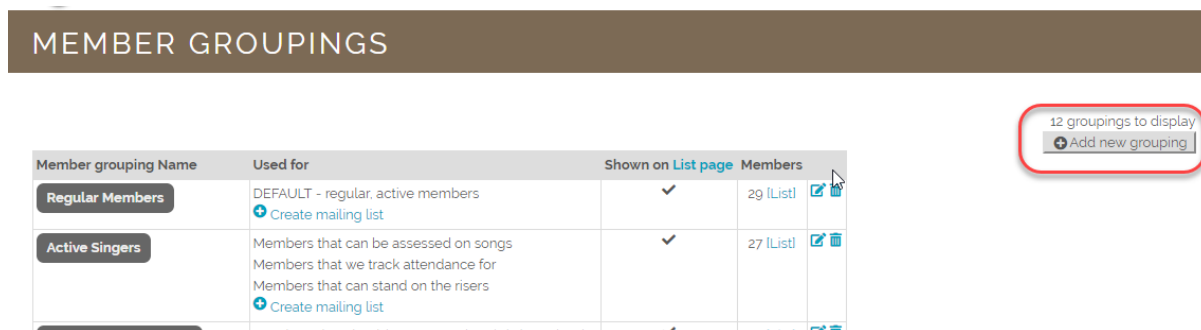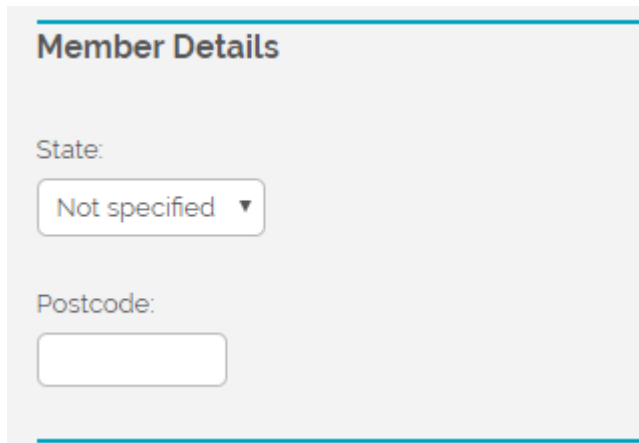

This displays a Member grouping Details page. To create a new member grouping, proceed as follows:

1. Enter a name for your new member grouping in the Name field shown in the image below...

2. Under the Name box is the Display ranking field. Entering a number in this box determines whether this member grouping appears as a tab on the Member List page, and if it does, what order/sequence it appears there. The grouping with the lowest number appears first on that page. Leaving this field blank means that this member grouping will *not* appear on the Member List page.

3. The next section allows for the specification of Member Details criteria.
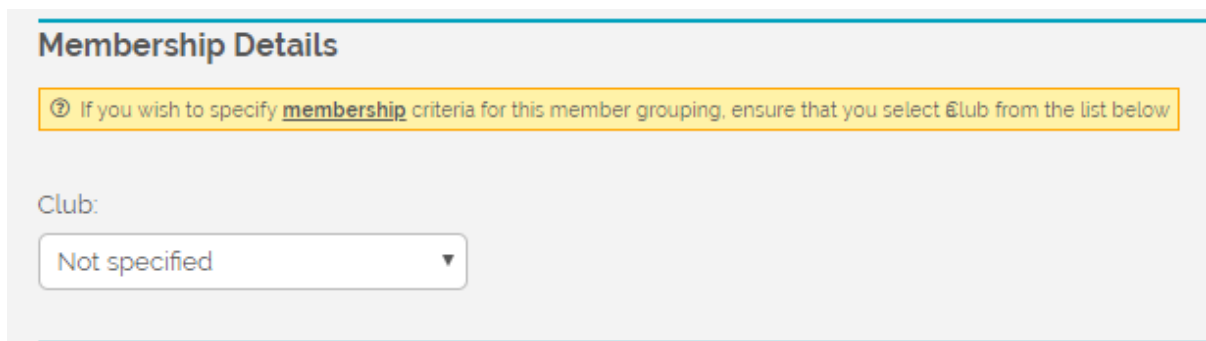
You can specify State or Postcode criteria for your member grouping. If these criteria are not relevant to the specification of your member grouping, then you simply leave them as Not specified, as shown in the image above.

4. The next section, Membership Details, allows for the specification of *membership* criteria. The default member groupings called Regular Members and Members and Helpers are examples of groupings that make use of membership criteria (and *not* participation criteria). By default, the Membership Details section appears like this...

If the definition of the subset of members you want includes *membership* criteria, select your club/chapter from the drop-down list. This is optional. If the subset of members you want is solely based on *participation* criteria such as section/voice part, then you can leave this as "Not specified".

To specify membership criteria, select your club/chapter from the drop-down list. When you do this, a list of membership criteria is displayed, as shown below...

You can now specify criteria based on membership Type/Role, Level, Status, Dues Payable, Dues Schedule, Happy to be on Mailing lists?, membership Expired?, and a number of different Date range criteria.

5. The next section, Ensemble Details, allows for the specification of criteria based on each member's participation in an ensemble. The default member grouping called Active Singers is an example of a grouping that makes use of participation criteria (as opposed to membership criteria). By default, the Ensemble Details section appears like this...
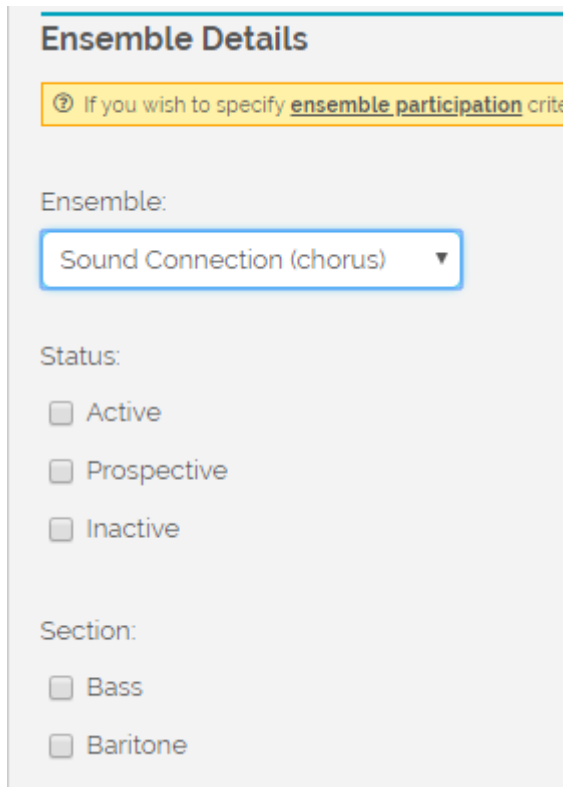
If the definition of the subset of members you want includes ensemble participation criteria, select the relevant ensemble from the drop-down list. This is optional. If the subset of members you want is solely based on *membership* criteria, then you can leave this as "Not specified".

To specify ensemble criteria, select the relevant ensemble from the drop-down list. When you do this, a list of ensemble participation criteria is displayed, as shown below...
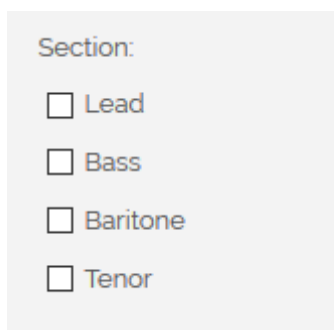
You can specify ensemble criteria based on the member's ensemble Status and Section, whether he/she has a special role?, and whether he/she is on the Front row?.

6. Once you have specified all the necessary criteria for your member grouping, click Save at the bottom of the page.

Important Notes about Selecting Criteria

1. Ticking all boxes for a criterion is the same as ticking none. For example, the following two examples of criteria are functionally identical...

...is the same as...

That may seem counter-intuitive, or even wrong. But it works like this: The first example means "When selecting members, the Section field is not important". The second example means "When selecting members, match members in the Lead, Bass, Baritone or Tenor sections (i.e. in any of the four Sections)".

2. Ticking n/a may not do what you think it does. For example, the following criteria...

...does *not* select members with *any* Level. It does *not* mean, "When selecting members, Level is irrelevant/not applicable" (or in other words, match members with *any* Level). Instead, it means "select members that specifically have n/a ticked in their Level field".

Updating and deleting Member Groupings

Member groupings can be updated or deleted from the Member groupings page, using the icons in the right-hand column (circled below)...

Clicking on a grouping's "Update" icon will allow you to modify or update the member grouping details, in described above in the section called Adding a Member Grouping.

Clicking on a grouping's "Delete" icon will allow you to delete a member grouping entirely from the system.

Important: Ensure that there are no mailing lists associated with the member grouping before you delete it. If there is one, visit the Mailing Lists page and delete it first. Also, ensure that there is nothing for that member grouping in the Used for column. If there is, visit the Website Setup and Configuration page, and wherever this member grouping is selected in one of the drop-down lists, select some other member grouping. The section below called Configuring Member Groupings describes how to do this.

Configuring Member Groupings

As a Making Music Platform administrator, you can configure which member grouping is to be used for specific areas of the site. For example, you can specify which subset (member grouping) of members can be assessed on songs, or which members to track attendance for. This is done as follows:

1. Logged in as a webmaster, click on the "cog" icon in the top-right corner of your page

2. On the Website Setup and Configuration page, click the cog next to Making Music Platform

3. Click the Configuration tab

4. Scroll down to the Member Groupings section...

The left side shows the areas of Making Music Platform where a member grouping is required, while the right side shows the member grouping currently used for that area. The member grouping for an area can be changed simply by selecting the name of a different member grouping from the drop-down list.

5. Click Save at the bottom of the page.

SETTING UP YOUR MANAGEMENT TEAM AND THEIR ROLES IN THE PLATFORM

Positions

Making Music Platform has a feature called Positions for identifying the members of your group who are involved in running the group.

Positions can be assigned to individuals in your group. When a person steps down from the role, that Position can be reassigned to the new Position holder. This means that your Platform will automatically update any contact details associated with the previous position holder, making for a smooth changeover.

You can also associate certain tasks on your Making Music Platform with a Position. For example if you have a member who is always responsible for managing group donations, you can create a Position called 'Donations Officer' and assign all donation notification emails to them.

You can create new Positions from your Officers page (which could also be called the Management Team page). To create a new Position:

Log into your Making Music Platform as an administrator.

Go to your Officers or Management Team page.

Click the link at the top of the page which says 'Create new: Position'.

Enter the details of the Position into the page: its name, the type of Position it is, the official email address (if any) that should be created for the Position, whether the Position is visible to members or the public etc.

Click Save at the bottom of the page.

See also: our help guide How to fix 'Enter a valid Position ID' messages.

If you cannot find what you are looking for in our help guides or have any questions please get in touch.

The Committees & Teams page

All your Making Music Platform committees & teams can be viewed on the Committees & Teams page. To access this page, proceed as follows...

1. Log into your Members area as an administrator

2. Click on the icon called Committees & Teams. If you don't see this icon, then click the Admin link at the top-right corner of the page to take you to the Admin Dashboard, then scroll down to the Members section, and click on the Committees & Teams link in the Public/Member Pages column.

3. You are taken to the Committees & Teams page, shown below...

Your group's committees and teams are listed here, along with the number of members in each, and the number of documents stored in the system for each. Clicking on a team's Name will display the committee/team's page (see below).

A new committee/team can be created from this page by clicking on the Add new committee/team button at the top-right of the listing of teams.

Committee/Team's details page

Clicking on a team Name on the Committees & Teams page displays the Committee/Team's page. The top half of the page looks like this...
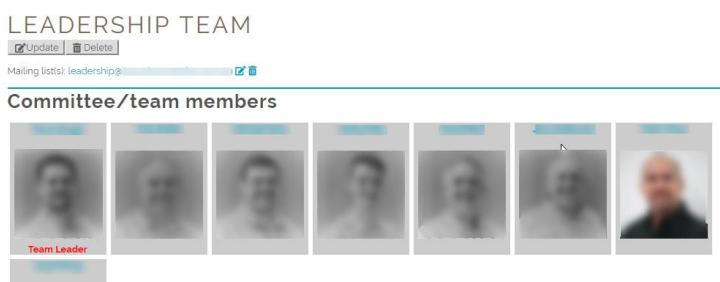
This section of the page displays the following:

1. The name of the Committee or team whose details you are viewing.

2. Buttons to Update or Delete the committee/team.

3. The name of any mailing list associated with this committee/team. If a mailing list doesn't exist, a link will be shown here to allow you to create one.

4. The team members are displayed, along with their photos. Any team leaders are identified under their photos, as shown in the image above.

The bottom half of the page displays the documents associated with the team and allows admins to add new documents for the team, as shown below...

Adding a Committee/Team

From a Making Music Platform perspective, a committee/team is simple to set up. You need to give the team a name, and manually select the team members from a list of members. You can also specify whether the committee/team is currently active and whether the committee/team's documents are to be kept private (visible only to the committee/team members) or not (visible to all members).

A new Committee/team can be created from the Committees & Teams page. To do this, click on the Add new committee/team button (circled below)...

This displays the Committee/Team Details page. To add a new committee/team, proceed as follows:

1. The top section of the page is shown here...

Committee/team Details

Name:

[   ] * Required

Club:

Pivotal Point Harmony Inc (Club)

Active?

☑

Documents are private?

☐

ⓘ Ticking this box will make this team's documents visible to only the team members

Enter a Name for your new Committee/Team.

2. A committee/team can be active or inactive. "Active" means that they are listed on the Committees & Teams page. By default, all new committee/teams are "active"

3. Ticking the Documents are private? tickbox means that all documents displayed on the committee/team's page are visible only to members of that committee/team. If the box is not ticked, then all documents on the committee/team's page are visible to any member who can log into your Making Music Platform with Regular Member Access.

4. Next, the Committee/team members for this committee/team are manually selected from a list of your members.

Committee/team members:

☐ S   on
☐ D   tt
☐ A   itt

Simply tick the boxes next to the names of any members who are to be a part of this committee/team.

5. Next, the Leaders/Captains/Chairpersons for this team are selected.

Leaders/Captains/Chairpersons:

ⓘ Leaders/Captains/Chairpersons ticked below MUST also be ticked in the main committee/team members list above

☐ St   n
☐ D   itt
☐ A   itt

The names of any team leaders are ticked in the same way as described in step 4 (above). Note: Any person selected as a team leader must also be selected as a member of the committee/team in step 4.

6. Click Save at the bottom of the page.

Updating and Deleting a Committee/Team

A committee/team can be updated or deleted from the committee/team's page. At the top of the page, under the name of the committee/team, are Update and Delete buttons (circled in the image below)...
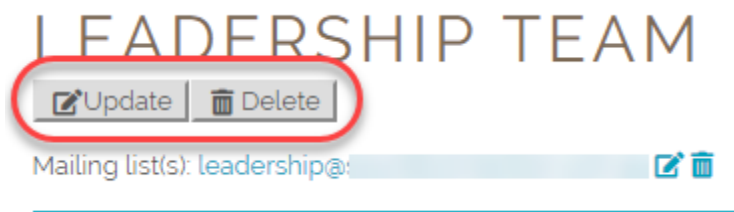
To update a committee/team, click on the Update button. This displays the Committee/team details page. Modify any of the page details, just as described above in the section called "Adding a Committee/Team".

To delete a committee/team, click on the Delete button. This displays the Confirm Delete page. Click Confirm Delete at the bottom of the page, to delete the committee/team.

Adding a Document for a Committee/Team

Navigate to the page of the Committee/Team that you want to add the document for, as described in the "Committee/Team's page" section above. The bottom half of this page is a list of the documents associated with this team if any. To add a new document for this team, perform the following steps:

1. Logged in as an administrator on the Committee/Team's page, scroll to the bottom half of the page to the Documents section, and click on the Add new document button on the far-right at the top.

2. On the Document Details page, the first section appears as shown here...

Enter a Title for the document.

3. Select the Type of document. In the case of the club shown above, they only have one "Committee Document Category" of General committee/team document, and so this is displayed here. Otherwise, the Type of document field will appear as a drop-down, listing the types of document available, as shown below.

4. The member the document is Posted by and the Date Posted are both required fields, and will likely be filled in automatically.

5. The bottom half of the Document Details page is shown below...

The document you are adding can be a document uploaded from your computer, or it can be a YouTube video.

To upload a document, click on the Choose File button (circled above), and select a file from your computer. Add Text to display for the document (this text will be used as the "filename" for the document on your site).

To make the document a YouTube video, or to upload a YouTube video along with your document, simply copy the video URL into the YouTube Video URL field.

6. Below this, there is a "For more information" field, allowing you to specify a URL to link to further information regarding the document, and a Description field, where anything additional required can be added to the document page.

7. Click Save at the foot of the page.

Creating a mailing list for a Committee/Team

A mailing list for a team can be created from the Committee/Team's page, outlined above. At the top of the page, under the page title, we can see the Create mailing list link (circled in the image below)...

To create a mailing list for your Committee/team, proceed as follows:

1. Click on the Create mailing list link (circled above). This displays the Mailing list Details page.

2. The top of the Mailing list Details page is shown in the image below...

3. Enter a Name for your mailing list, such as "Website Team Mailing List".

4. Enter an Email address and Password for your mailing list. Note that you are *inventing* a *new* email address here (and inventing a password). This will be the email address that people send emails to if they want their email to be distributed to all members of the committee/team. For example, if the mailing list is for the "Website Team", then you could enter something like 'webteam' into the email address field, which will create the email address webteam@yourgroup.com.

5. Specify who can *see* the new mailing list...

6. The number entered for Display Ranking specifies where this mailing list will appear in the list of mailing lists on the Mailing List page.

7. Click Save at the bottom of the page.

CREATING LOGINS TO THE PLATFORM

Member Logins

Each of your members need a login to access your Making Music Platform's Member Area.

There are two ways to create logins for your members:

- You can create a login individually for one member from that member's profile page.

- You can create logins for multiple members in bulk from your Logins Administration page.

To create a login for one member

1. Log into your Members' Area as an administrator.

2. Find the member's profile. You can search for their name in the Member search bar in the top left corner of any page on your Platform, or you can find them in your Member List.

3. Scroll down the member's profile page past their personal and contact details. You should see a tab labelled 'Website Logins': click that tab.

4. If the member already has a website login you will be able to view it here. If they don't yet have a login, you can create one by clicking 'Add new login'.

5. You'll then see a form titled 'Login Details'. Enter the details of the member's new login into the form. You need to create a username, decide on the login's Access Level and generate a new password for the login. For more information on Access Levels, see the second half of this help guide.

6. Click Save at the bottom of the page.

To create a login for multiple members

1. Log into your Members' Area as an administrator.

2. Click the 'Admin' link in the top-right corner of any page on your Platform to go to your Administration Dashboard. For more information about the Admin Dashboard, please see our help guide.

3. Click the 'Member Logins' link in the Admin Pages (second) column and Members (seventh) row in your Admin Dashboard.

4. Select all the members for whom you want to create a login.

5. Scroll below the list of members: you'll see a preview of the email that members will receive to notify them about their new login. You can change the text of this email by clicking the 'Edit this text' button.

6. Scroll to the bottom of the page and click the Submit button.

Access Levels

Every member login has an assigned Access Level (for an introduction to the concept of MM Platform's Access Levels, please see Making Music Platform Concepts).

Whenever you edit a page, add a resource or an event to your Making Music Platform you can select what Access Level that item has. Members who have logins that have equal (or higher) Access Levels than the item will be able to see it on your site, whereas members with a lower Access Level will not. There are five Access Levels in Making Music Platform:

- Public Access

- Limited Member Access

- Regular Member Access

- Data Administration Access

- Webmaster Access

Public Access is the Access Level for the general public and website visitors who don't have a Platform login, or are not currently logged-into their account.

Limited Member Access is the lowest Access Level which you can assign to a login. It should be assigned to members who aren't entitled to access your entire site, for example prospective members. These members will only be able to see the pages and resources that you have designated visible to Limited Members (as well as all Public pages).

Regular Member Access is the standard Access Level for members. Individuals with Regular Member Access will be able to see all pages which you have designated visible to Regular Members (as well as all Public and Limited Member pages). Members with Regular Member Access cannot edit the website (apart from updating their own details) and may not view your Platform's administration pages.

Data Administration Access is for members who need to access specific administrative areas of the website, and who should have limited permissions to update the website. The purpose of Data Administration Access is to allow you to delegate group admin tasks to the responsible members of your group: those members will be able to access restricted pages which relate directly to their task, but they won't be able to see or update other parts of the website. When you assign Data Administration Access to a member's login, your Making Music Platform will prompt you to select the administrative areas that the member should be able to access.

A few examples of members who could have Data Administration Access:

- Your group's Librarian might have Data Admin Access with permission to update the Library Items and Library Loans databases.

- Your group's Attendance Monitor can be a Data Administrator with permission over the Attendance/Availability database.

- Your Concert Manager could have Data Administration permissions for the Events and Venues databases.

Webmaster Access is the highest Access Level in Making Music Platform. Webmasters can access and update all parts of your Platform. Most groups will have just one Webmaster.

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How to see what data admin permissions are required to view each page?

In your Administration Dashboard (under the Website Content section) go to the list of all website pages and then export these in a user friendly format. Under the table to open column in the spreadsheet, this shows what permissions someone with data admin permissions would need to access this page.

We hope you find this Making Music resource useful. If you have any comments or suggestions about the guidance please contact us. Whilst every effort is made to ensure that the content of this guidance is accurate and up to date, Making Music do not warrant, nor accept any liability or responsibility for the completeness or accuracy of the content, or for any loss which may arise from reliance on the information contained in it.