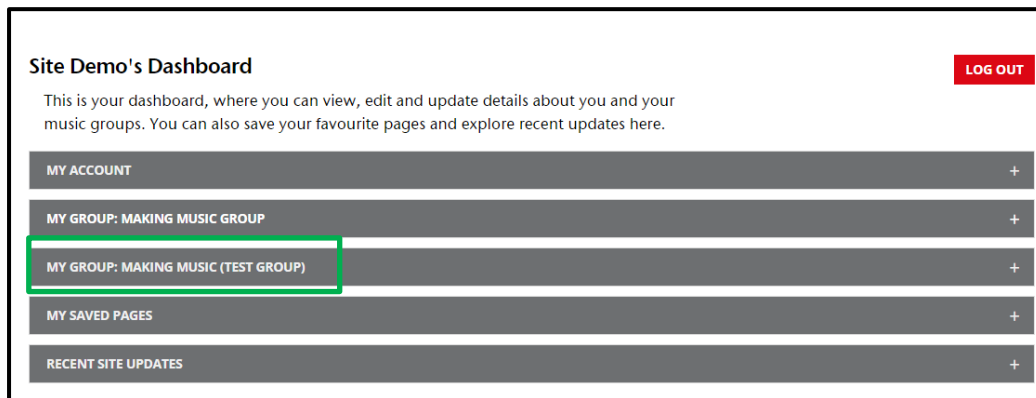


# Making Music Website User Guide

## User Guide no. 2a: My Dashboard: My Group (Manage My Group)

### My Dashboard - a quick overview

'My Dashboard' is your main admin area of the site – it is where you can view, add and update details about you and your group. Whenever you are logged into the site you will see a tab on the right-hand side of the screen that says 'My Dashboard' - just click on the tab to go to your Dashboard. It will look similar to the below.

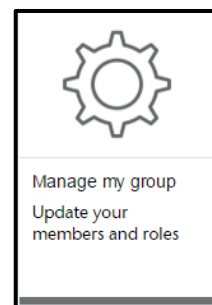


When you click on any of the grey bars more options will appear. Depending on your level of website access you will see different icons in the My Group area of your Dashboard (highlighted in green) and have access to different functions. There are two levels of website access; User and Group Admins:

1. Users can access all of our online resources. In the Dashboard they can:
  - view the group profile, add and edit events, add and edit vacancies
2. Group Admins can do all the above, plus;
  - edit the group profile
  - view membership and insurance information
  - access insurance documents
  - renew membership and insurance (during renewals period)
  - manage contacts (i.e. invite people to join the group and give Group Admin website access)

### This guidance focuses on a specific part of your Dashboard and is for Group Admins

- My Dashboard: My Group: Manage My Group. The icon looks like this:
- It is only available to those with a Group Admin access.
- It is where you can update details of the people in your group, assign website permissions and invite new people to register for our site
- If you need more general guidance about your dashboard or guidance on a different function please [see our separate guidance](#).



# My Dashboard: My Group: Manage My Group








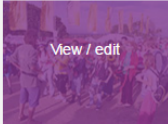


- The My Group area of your dashboard will be similar to the one below. If you can't see all the options just click on the grey bar that says My Group and they will appear.

**Site Demo's Dashboard** LOG OUT

This is your dashboard, where you can view, edit and update details about you and your music groups. You can also save your favourite pages and explore recent updates here.

**MY ACCOUNT** +

**MY GROUP: MAKING MUSIC GROUP** +

 Group profile	 Manage my group Update your members and roles	 Full group membership - up to £7,200 Expires 31 Dec 2016	 Bronze Insurance Expires 31 Dec 2016	 Remove this group from my account	 View/edit group's sheet music listings
 Add event	 Award for Young Concert Artists presentation concert 18 Jun 2016	 Add vacancy	 View Insurance Documents		

- Clicking on the Manage My Group icon (highlighted in green) will bring up the Contact Manager - see next page

## Contact Manager

- After you have clicked on the Manage My Group icon you will see the Contact Manger. It will look similar to the below.
- If you are a Group Admin for more than one group, select the group you wish to view from the drop down menu here

The screenshot shows the 'Contact Manager' interface. At the top, there is a dropdown menu labeled 'SELECT GROUP TO MANAGE:' with 'Making Music Group' selected. Below this is a red-bordered box containing 'MM REP: Sally Palmer'. The main section is titled 'Group members' and contains a table of members with an 'Edit' link for each. The 'Edit' link for 'Ollie Mustill (Chair)' is circled in green. Below the table is a section for 'Members awaiting approval & Invited Members' with a member 'Ben Saffell' and a button 'awaiting approval' circled in purple. At the bottom left, there is a button '> Invite new member' circled in orange.

Group members	
Ollie Mustill (Chair)	Edit
Xenia Davis	Edit
Sally Palmer (Treasurer)	Edit
Alison Reeves	Edit
Alexandra Scott	Edit
Rey Trombetta	Edit
Jamie Novick	Edit
Site Demo (Committee Member)	Edit
Laura Shipsey	Edit

Members awaiting approval & Invited Members

Ben Saffell	Edit Members awaiting approval
awaiting approval	

> Invite new member

There are four things you can do from this page (further details for all four are provided in the pages below)

1. **MM Rep:** this is where you can set who is MM Rep for your Group – [click here for further instructions](#)
2. **Edit:** this is where you can change roles and website access for people already listed as being in your group - [click here for further instructions](#)
3. **Edit member awaiting approval:** this is where you can accept or deny someone who has requested to be linked to your group via the website - [click here for further instructions](#)
4. **Invite new member:** this is where you can invite people to register for the site and be linked to your group - [click here for further instructions](#)

1. **MM Rep:** this is where you can set who is MM Rep for your Group

- This one is simple – you just select the person’s name from the drop down menu (highlighted in red).  
Please note: only those with Group Admin website access can be an MM Rep – so only those with Group Admin website access will appear in the drop down list. See ‘2. Edit’ below.

2. **Edit:** this is where you can change roles and website access for people already listed as being in your group

**Contact Manager**

SELECT GROUP TO MANAGE: Making Music Group

MM REP: Sally Palmer

Group members

Ollie Mustill (Chair)	Edit
Xenia Davis	Edit
Sally Palmer (Treasurer)	Edit

- Click on Edit (highlighted in green) to bring up the screen below

Ollie Mustill

Group role(s)

<input type="checkbox"/> TREASURER	<input checked="" type="checkbox"/> CHAIR	<input type="checkbox"/> COMMITTEE MEMBER
<input type="checkbox"/> MUSIC DIRECTOR/CONDUCTOR	<input type="checkbox"/> SECRETARY	<input type="checkbox"/> LIBRARIAN
<input checked="" type="checkbox"/> GROUP MEMBER	N.B. Removing 'Group Member' role will delete the person entirely from your group.	

Website access

<input type="radio"/> USER	Can view all members-only content and edit group listings for events, vacancies and the music bank.
<input checked="" type="radio"/> GROUP ADMIN	As user, but can also view/edit membership and insurance details and manage contacts. MM Reps are group admins by default.

Save Changes

- **Group Role (s):** set and update the group role by ticking and unticking the relevant boxes (Note: it is possible to have more than one role)
- **Group Member:** If you would like to remove the person from the group completely you must untick the Group member box – this will remove them from the list and they will no longer be able view group information or access site resources
- **Website Access:** you can change website access permission here by ticking and unticking the relevant box.

[Click here to go back to menu](#)

- Edit member awaiting approval:** this is where you can accept or deny someone who has requested to be linked to your group via the website.

## Contact Manager

SELECT GROUP TO MANAGE: Making Music Group ▾

MM REP: Sally Palmer ▾

Group members

Ollie Mustill (Chair)	Edit
Xenia Davis	Edit
Sally Palmer (Treasurer)	Edit
Alison Reeves	Edit
Alexandra Scott	Edit
Rey Trombetta	Edit
Jamie Novick	Edit
Site Demo (Committee Member)	Edit
Laura Shipsey	Edit
<b>Members awaiting approval &amp; Invited Members</b>	
Ben Saffell	<b>Edit Members awaiting approval</b>
awaiting approval	

> Invite new member

- Anyone who has requested to be linked to your group will appear in in the 'Members awaiting approval and invited members list' (highlighted in green). Clicking the 'Edit Members awaiting approval' link (highlighted in red) will bring up the below box:

Group Members

To approve a member, click the tick mark. To decline/remove, click the cross. Members with neither box ticked (coloured) will be left as pending.

Ben Saffell	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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Save Members

Simply:

- Click in the  box to reject and click  . This will remove their name from the list
- Click on the  box to accept them and click  . They will then appear in the group members list and you can Edit their role and website access (see above)

To find out more about how someone can request to be linked to your group see our [separate guidance on My Dashboard: My account.](#)

[Click here to go back to menu](#)

4. **Invite new member:** this is where you can invite people to register for the site and be linked to your group

**Contact Manager**

SELECT GROUP TO MANAGE: Making Music Group

MM REP: Sally Palmer

Group members

Ollie Mustill (Chair)	Edit
Xenia Davis	Edit
Sally Palmer (Treasurer)	Edit
Alison Reeves	Edit
Alexandra Scott	Edit
Rey Trombetta	Edit
Jamie Novick	Edit
Site Demo (Committee Member)	Edit
Laura Shipsey	Edit

Members awaiting approval & Invited Members Edit Members awaiting approval

Ben Saffell	awaiting approval
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> Invite new member

- Clicking Invite New Member (highlighted in green) will bring up the below screen

**Invite**

[Back to Contact Manager](#)

Please enter the details of the person you would like to invite to join your group. If they are already a Making Music member an email will be sent with the appropriate link to join your group.

FIRST NAME \*

SURNAME \*

EMAIL ADDRESS \*

INVITE USER

- Complete the details of the person you would like to invite and click **INVITE USER**.
- This will send them an email inviting them to register for the site. When you go back to your Contact Manager they will appear in the list of 'Members awaiting for approval & invited members' – see below:

Members awaiting approval & Invited Members Edit Members awaiting approval

Ben Saffell	awaiting approval
Test User	Invited <span>Send Reminder</span>

> Invite new member

- You can send them a reminder email by clicking on **Send Reminder**. Once they have accepted your invitation and registered for the site they appear in the Group members list and you can Edit their role and website access (see above).

[Click here to go back to menu](#)