MM Platform Help guide: Getting started with your 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 guidance should be read first and covers what you need to know about how the Making Music Platform works before you start to design or customise your own 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).

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GENERAL ADVICE BEFORE YOU BEGIN

Share the Workload

MM Platform is designed so that no single group member has to manage everything. Most Platforms will have one webmaster, whose job it is to manage the technical aspects of the website, assign admin tasks and fix problems. The upkeep of the site and day-to-day administration can be delegated to other members and admins in your group. For example:

- Your group's membership manager updates membership details

- Your event coordinator manages the event calendar

- Your music team curates the music library and upload learning aids, sheet music etc.

- Your publicity officer writes newsletters and send them out to your group's mailing lists.

While the webmaster can see every part of the site, roles like the ones above can be restricted so that admins can only view and update the areas for which they're responsible.

For more information, see our guidance on Platform Access Levels

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

How much time do we need to set the Making Music Platform up?

This will vary from group to group, depending on how many of the features you are using and how many people you have working on it.

As a rough rule of thumb, we think a few people each working for a few hours per week could have a full Making Music Platform up and running in a couple of months.

Some basic guidelines are:

- More than one person working on it will definitely be helpful.

- A team of three with one leading is probably ideal – more than three can work but be wary of cooks and broths.

- Plan what you want to use your Making Music Platform for - the system is modular – so you might decide, for example, to just use the member database, rehearsal attendance tracking and emails first of all – then add member invoicing, and sheet music tracking later down the line.

- The team doing the work might be small – but involving the full committee in planning what tools you want to take advantage of is a good idea.

- Once you know how you want to use your MM platform having a clear plan for the order you will go about setting things up is a good idea

- The team can (and will almost certainly have to) work remotely – but some face to face sessions might be useful.

Making Music has created a Platform Project Plan to help you.

Where can we go to get support for setting up our Platform?

Once we have created your Making Music Platform and helped you to get started by adding your logo, some photos (taken from your existing site) and importing data if required, we will then hand it over to you to add content and set up the admin tools to work in the way you want.

To help you with this you have access to many different resources such as:

- [Making Music Platform Project Plan](#)

- [Making Music Platform Help Guides](#)

- [Making Music Platform Advice and Support Facebook Group](#)

- Direct support from the Making Music membership team - platform@makingmusic.org.uk or 020 7939 6030 (10 am – 5 pm Monday, Tuesday, Wednesday, Friday and 10am – 2pm Thursday). *

*The membership team will act as the first line support and will be able to handle most queries, by email or phone, on any aspect of the system. Please note that all email queries will be responded to within 5 working days. There may be some questions we can't help with as the team are not IT specialists and in those instances we will refer queries on to the software owner HarmonySite for help.

As your MM Platform is managed by you, our approach, where appropriate, will be to explain things to you rather than doing things for you. This will give you better understanding of the system so you can manage it without help from us and as efficiently and effectively as possible.

That doesn't mean you shouldn't ask as many questions as you want, whenever you need to, nor does it mean that we won't get more involved where necessary.

There is no additional cost for this support, including when we have to refer queries to software owner HarmonySite.

However, we do reserve the right to charge for some support queries that require a lot of staff time and/or are of a particularly complicated nature. We will always try to avoid this and provide support for free. If we do think we need to charge we will always discuss it with you and explore the options before any work is done. Any fee we charge will be to cover costs and not to make profit.

Accessing the groups Making Music Platform

When we first set your Platform up we will send you two emails.

- The first email will contain the link to your new site (e.g. mygroup.makingmusicplatform.com) and the login details that you will need to access the members area and admin section of the site.

- The second email will contain the log in details that you will need to get past the additional lock screen that we place on the site. We place this lock screen on the site for additional security. If you have opted to add the SSL certificate then this screen will be replaced by the certificate once you go live/have picked a domain name for your members area.

N.B. It Is important that you make sure that you get the right login details for each stage and that they are entered correctly. Too many incorrect username/password attempts can result in your IP address being blocked by the Harmony Site server. If this does happen to you see the guidance on Useful links for information to unblock.

Once you have logged into the lockscreen and you can see your Platform, you can then log into your Platform by clicking on the Members Area button in the top right hand corner of your Platform.

Useful links

- **IP address unblocker** – If you find that you are unable to access your site and get an error message along the lines of 'can't reach this page.. took too long to respond', it is likely that your IP address has become blocked by the HarmonySite server. You can unblock it by following the instructions on this link.

- **Making Music Project Plan** – A bite-sized approach to building and designing your Platform.

- **Making Music Platform Advice and Support Facebook Group** – Ask questions and discuss problems with other Making Music members using the Platform.

- **Feedback forum** - do you have an idea for a new feature? Submit your suggestions on the Feedback forum. The developer uses this as a basis for any development work.

THE MAIN AREAS OF YOUR PLATFORM

Introduction to the main areas of your Platform

There are three main areas you will be using to edit, manage and administer your Making Music Platform:

- Members Home Page
- Administration Dashboard
- Website Setup and Configuration Page

Please see the sections below for more information about each of these areas and how they work.

Members Home Page

The Members Home Page is the first page your members will see once they have logged in and allows them to navigate their way around the site. The Members Area displays links to all the pages they have access to. To make a page accessible via the Members Area page make sure that both the actual page and the navigation link for the page are set to either 'regular member' or 'limited member' access. Anything that is set to data administration access or above won't show on this page but will appear in the administration dashboard or website and configuration page. More information about website pages and navigation links can be found in our Customising your Making Music Platform help guide.

The Members Area features the following module displays:

- Announcement and reminders
- Events – My Attendance/Availability

- My Assessments

- Upcoming Birthdays & Anniversaries

- My Financial Status

- Required Audit Responses

- Latest Comments

Top Tip: All of these module displays are optional and can be turned off in the website set up and configuration page.

Along the top bar the member will be able to see an icon (this will be a photo of themselves if they have uploaded one) with their name next to it. Hovering over this will show a drop down that will allow members to view their profile, update their details, change their password, and log out of their account. There will also be notifications along the top of the page for anything that members need to attend to e.g. invoices that need to be paid or audits that need responding to.

The Administration Dashboard

The Admin Dashboard is the central administrative hub of your Making Music Platform. It lists all the pages on your site (including public, members only, administrative and database pages) and is the best starting point whenever you need to find a page.

Webmasters and Data Administrators can reach the Admin Dashboard by clicking the small 'Admin' link in the top-right corner of any page on your Platform.

TIP: Webmasters will be able to see the whole Admin Dashboard, whereas Data Administrators will only be able to see links to the areas over which they have admin permissions. For more information on Data Administrator access and admin permissions, please see our Member Logins help guide.

Navigating the Admin Dashboard

The Admin Dashboard table lists all of the administrative areas which are currently enabled in your Making Music Platform.

The Admin Dashboard has three columns:

- The Public/Member Pages column – this lists all public and member-only pages in your site.

- The Admin Pages column – this lists admin-only pages in your site. These pages are the best starting point for any administrative tasks you need to carry out.

- The Database Tables column – the pages in this column display information directly from your website's database.

If you need to make changes to an area of your site, the best place to start is usually on the Public/Member Pages. If you need to carry out an administrative task, look at the Admin Pages. And if neither of those areas offer the admin capabilities that you need, you can update your Platform's database directly via the Database Tables.

Making Music Platform account status and details

At the top of your Admin Dashboard you'll find several links for administrating your Making Music Platform account.

By clicking these links you can view how much server space your Platform has remaining and access the Platform help guides.

The Website Setup and Configuration Page

The Website Setup and Configuration page is where fundamental information about your group and your Making Music Platform is stored. This page is only visible to Webmasters, and it can be reached via the Cog icon which appears (when logged-in) in the top-right corner of any page of your Making Music Platform.

TIP: for more information on the Webmaster Access Level, please see our help guide on Member Logins.

On your Website Config page you'll see a table with at least three rows.

Type	Name	Primary Ensemble	Active	Settings
Making Music Platform	The Big Example Band			⚙
Association	Big Example Band			⚙
Training Band	Big Example Training Band	○	✔	⚙
Band	Brass Band	●	✔	⚙
Singers	Big Band Singers	○	✔	⚙
			Save ensemble changes	

- The top row ('Making Music Platform') links to the configuration settings for your Making Music Platform. These settings are the most commonly-used ones on this page, and they determine the behaviour of your Making Music Platform.

- The second row ('Association') links to the administrative settings for your group. You'll rarely need to access these settings.

- The third row links to settings for your group's performing ensemble. If you have more than one ensemble, there will be further ensembles listed here. These settings determine some public information about your ensemble(s), such as its logo and location.

You can access the configuration settings for each of the above categories by clicking the cog icon to the right of the category name.

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

PRIVACY AND ACCESS LEVELS

Privacy Settings

Since different groups prioritise different levels of member privacy, Making Music Platform has a number of settings which allow you to customise what information should be visible to whom.

These settings can be found in your Website Setup and Configuration (for more information, please see our help guide). To find them:

1. Log in using a webmaster account.

2. Go to your Website Setup and Configuration page by clicking the cog icon in the top-right corner of any page of your Making Music Platform.

3. Click the Settings cog icon next to 'Making Music Platform | [Your group's name]' to open your Making Music Platform details.

4. Navigate to the tab labelled 'Configuration' and scroll about half-way down the page to the section titled 'Privacy'.

In the Privacy section you'll see several options for displaying/hiding your members' details from the public and each other.

Select the settings which are appropriate for your group and click the Save button at the bottom of the page.

If you select the settings 'Member photos are visible to the public?' and 'Basic member profiles are visible to the public?' then visitors to your site will be able to find a picture and short profile of your members on your site. Please note that if these settings are not selected then your member's name (but no other details) will still be visible on your site (but only if visitors search directly for that name). If it's important that your members' names do not appear anywhere publicly on the site, please let us know.

For more information on controlling the visibility of items on your Making Music Platform, please see our help guide Making Music Platform Access Levels.

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

Access Levels

An MM Platform user's Access Level determines what the user is able to see and edit on the Platform. There are five Access Levels:

- Public Access – 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 – for members of your group who are only entitled to view certain pages or resources in the Members' Area. You can use this Access Level for prospective members, for example.

- Regular Member Access – for standard members of your group. This is for members who should be able to view all pages and resources in your Members' Area.

- Data Administration Access – for members who should have access to all member pages and resources, and certain specific administrative pages. Members with Data Admin Access can be granted permission to update certain areas of your database.

- Webmaster Access – for your Platform's webmaster(s). Members with Webmaster Access can view and update all member pages and administrative areas on the Platform.

A member's Access Level is assigned to their website Login and can be changed by editing their Login. For more information, see our guidance on Member Logins.

Every page and item in your Platform has an Access Level which you can edit, meaning you can control exactly which members should be able to see that information. Certain pages will also display different information to members with different access levels (e.g. you might permit Regular Members to see all the songs in your Song Library, but Limited Members to see only a selection). For information on how to change a page's Access Level, see our help guides on Customising your Making Music Platform.

TIP: Webmasters can use Making Music Platform's 'view all pages with…' feature to check how pages appear to site visitors with different Access Levels. This feature is found in the top-right corner of any page on your site, under the Key icon.

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

Can we restrict pages so members of the group can't see them – and only committee members can?

Currently it's not possible to restrict page access to all committee members only. However, you can upload private documents for a committee, which only committee members will be able to see or access. See our Committees and Teams guidance as available on the Managing members, friends and sponsors in the Making Music Platform help guide.

You can also restrict page access using Data Administration Access. For example if someone is assigned Data Administration Access for events they could access event administration pages. Someone without Data Administration Access for events would only see the events pages a regular member could see. See: Access Levels and Member Logins.

Can we restrict pages so some committee members can see them and other committee members can't?

The most effective way to ensure that one committee member can see more than another is to assign them different Data Administration Access. For example, if you assigned a committee member Data Administration Access for events they could access event administration pages. A committee member without Data Administration Access for events would only see the events pages a regular member could see. See: Access Levels and Member Logins.

It is also possible to give some committee members to access a document and for other committee members to not have access. See our Committees and Team information as found on the Managing members, friends and sponsors in the Making Music Platform help guide.

Can we control access to each of the functions? For example, allowing certain members access to the database and admin functions and others just to their own data and events etc?

Yes, Making Music Platform has four different Access Levels which can be assigned to members, and which control the parts of the Platform that users will be able to view, use and edit.

This includes restricting committee members to only accessing the admin tools relevant to their role. For example you could give the Membership Secretary access to the invoicing tools, but not the event administration tools, and vice versa for the event manager.

Helo Guides:

- Access Levels

- Member Logins

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.