



INCOSE UK Website

Group Admin User Guide

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Accessing the admin area of your group

1. Login to your INCOSE UK account as usual and go to your group
2. Below the standard group menu should be an additional admin menu similar to the below.



3. Navigate between the various admin options using this admin menu.

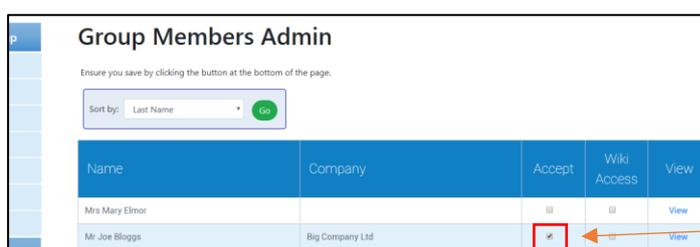
If you cannot see the admin menu, you should contact the [webmaster](#).

Members Admin - Accepting a group join request

1. Click the Member Admin option from the admin menu.



2. To accept a member simply tick the check box next to their name.



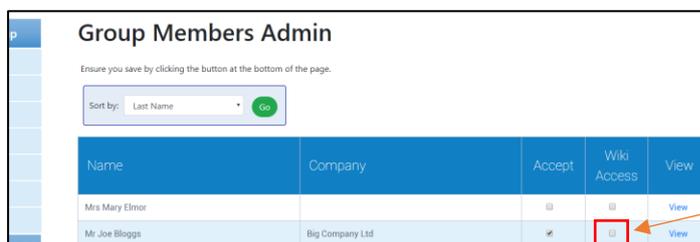
3. To save this change you will need to select the **Save Details** button at the bottom of the page.



Members Admin – Giving a member access to the Wiki

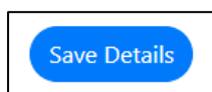
Also in the Group Members Admin, you can give a member access to the group Wiki.

1. To accept a member simply tick the check box next to their name.



⚠ The Wiki Access tick box appears on all groups, regardless of whether they have an active wiki or not.

2. To save this change you will need to select the **Save Details** button at the bottom of the page.



Non-Members Admin

The non-members admin can be used to add additional people, that are not members of INCOSE UK, to your mailing list.

Never add a person to your mailing list without asking them first.

1. Click 'Non-Member Admin' in the admin menu.



2. Here you will see a list of the groups non-members.
3. You can edit a non-members' listing by clicking the pencil icon next to their name.



4. You can delete a person by clicking the red bin icon.



5. To add a new person, click the '+ Add Non-Member' button at the top of the page.



6. This will add a blank field to the top of the list which you can then edit to put the name and email of the new non-member.

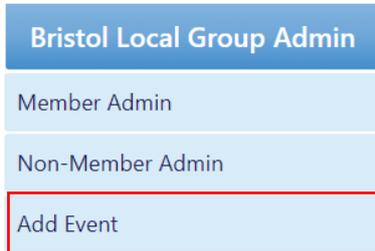
	ID	Name	Email	
	6853	<input type="text" value="Enter Name"/>	<input type="text" value="Enter Email"/>	

7. Don't forget to click the green save icon to save your changes.

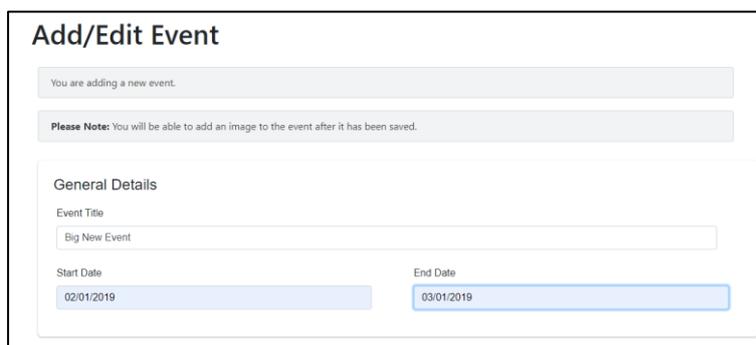


Adding an Event

1. Select 'Add Event' from the admin menu

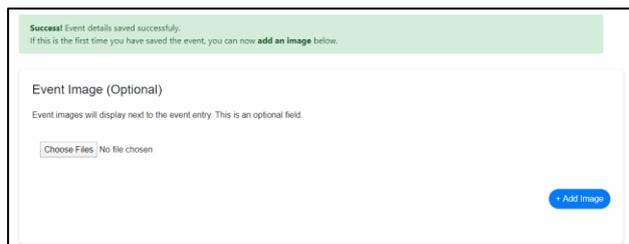


2. Enter the full details of your event.



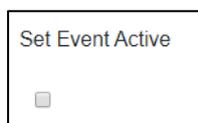
A screenshot of the 'Add/Edit Event' form. The form has a title 'Add/Edit Event' and a subtitle 'You are adding a new event.' Below this is a 'Please Note' section: 'Please Note: You will be able to add an image to the event after it has been saved.' The form is divided into a 'General Details' section with the following fields: 'Event Title' (containing 'Big New Event'), 'Start Date' (containing '02/01/2019'), and 'End Date' (containing '03/01/2019').

3. Click the '+ Create New Event' button at the bottom of the page to save your entry. The page will reload. It will not be LIVE yet.
4. Once the page has reloaded, you will see the option to add an image for the event has appeared at the top of the page. You can add a custom image here (for example, the group logo) or leave it blank. Leaving it blank will default on the calendar to the standard INCOSE UK logo.



A screenshot of the 'Event Image (Optional)' section. It shows a success message: 'Success! Event details saved successfully. If this is the first time you have saved the event, you can now add an image below.' Below this is a text area for the event image with the instruction: 'Event images will display next to the event entry. This is an optional field.' There is a 'Choose Files' button and a blue '+ Add Image' button.

5. Click the 'Set Event Active' tick box then the '+ Create New Event' button to make the new event live. The event will appear on the main INCOSE UK website calendar and the specific group calendar.



A screenshot of the 'Set Event Active' section. It shows a checkbox that is currently unchecked.

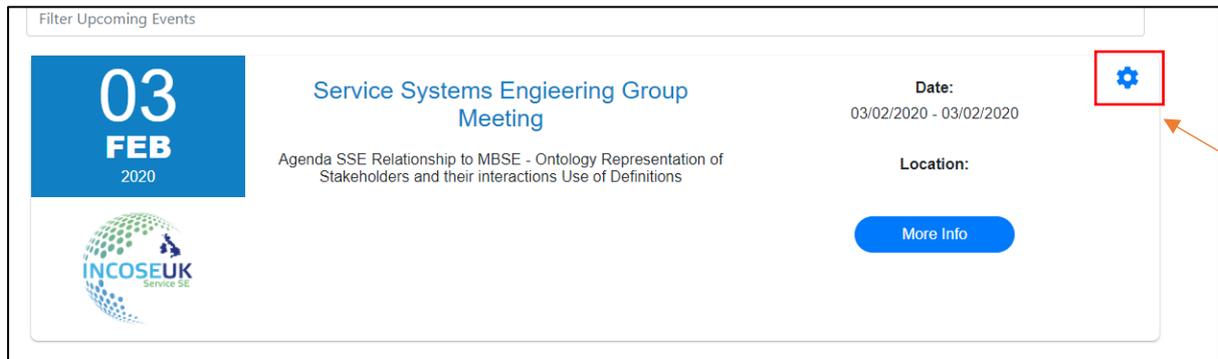
6. If you want to allow people to book for the event, you can click the 'Enable Event Booking' tick box.
7. Don't forget to save your changes by clicking the 'Update Event' button.

Editing an Event

🔑 You can view any bookings for an event in the 'Group Data' page in the admin menu

To edit a previously made event, follow the below steps.

1. Find the event you created in your group calendar.
2. Click the cog icon on the right hand side of the event entry (make sure you are logged in)



3. Now you can make changes to the event.

Add/Edit Event

You are now editing event: #7633

Event Image (Optional)

Event images will display next to the event entry. This is an optional

Uploading Documents

You can upload documents to the Documents area of your group or attach them to a group event entry.

1. Go to the 'Document Upload' page.
2. If you manage multiple groups, ensure the correct one is selected in the 'Select Group' dropdown.

Select group:

3. Select the file type. Only PDF or PowerPoint are permitted.

Select file type:

4. Select whether it is a 'Group Document' or an 'Event Document'

Select document type:

5. If you select 'Event Document' a new 'Event name' dropdown will appear.

03/09/2019 - DESIGN REVIEWS: PROCESS AND APPLICATION - A CASE STUDY
17/09/2019 - September meeting of the MBSE Interest Group
10/10/2019 - 4th Working Meeting

Member Admin Event name:

6. Enter a suitable document name and author. Fill in a date (dd/mm/yyyy).

Document name:

Document author:

Date produced: 

7. Finally, choose whether you want the document to be open on the website, or available to members.

Locked for members only:

8. Choose a file then click the 'Upload Files' button to add the new document.

Using the Document Manager

If you need to make a change to a document entry you uploaded, you can do so on the Document Manager page.

1. Choose 'Document Manager' from the admin menu.
2. A list of group documents will be displayed.
3. Click the pencil icon next to the document entry you want to edit.

	ID	Title/Author	Types/Location	Date	
	6454	Title: ECF Deputy Chair Nomination Form 2020 Published by: Early Careers Forum		17/01/2020	

4. You can edit the document title, author, document type, file type and date.

<p>Document Title</p> <input type="text" value="ECF Deputy Chair Nomination Form 2020"/>	<p>Document Type</p> <input type="text" value="Group Document"/>	<p>17/01/20: </p>
<p>Author</p> <input type="text" value="Early Careers Forum"/>	<p>File Type</p> <input type="text" value="PDF"/>	

5. Click the green save icon to save the entry.



6. You can also remove an entry by clicking the red bin icon.

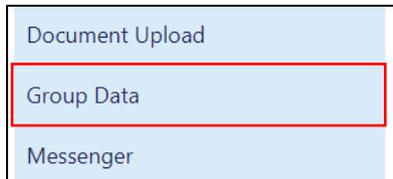


⚠ If you need to upload a revision document to replace a previous entry, you'll need to contact the [webmaster](#).

Group Data page

The Group Data page allows you to see information about bookings made for your group events. Only events where 'Enable Event Booking' was ticked will appear in the list.

1. Choose 'Group Data' from the admin menu.



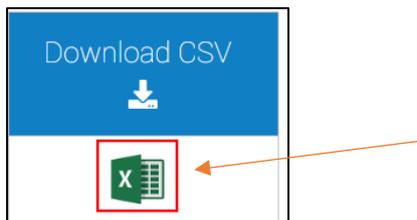
2. You will see a list of your group's bookable events.



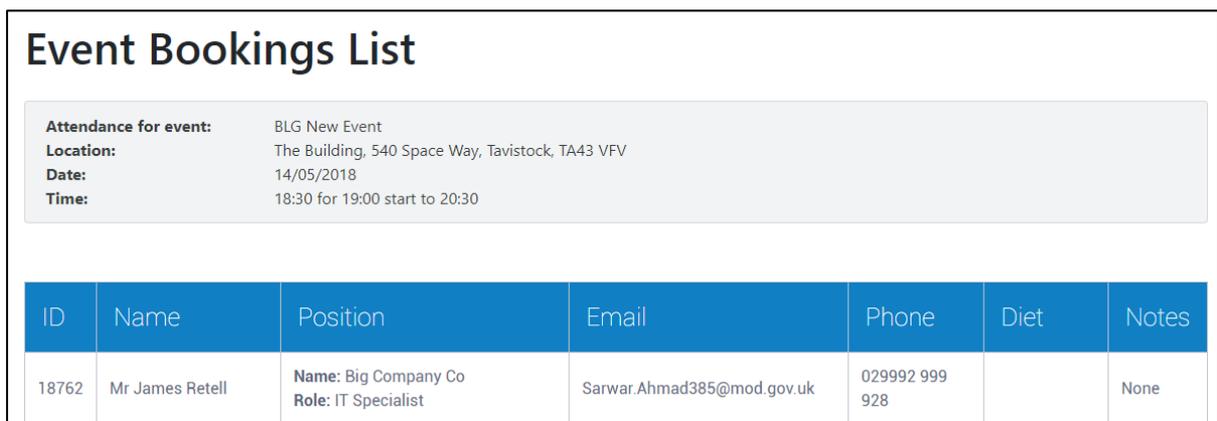
A screenshot of the Group Data page showing a table with three columns: 'Event', 'List', and 'Download CSV'. The 'Event' column contains the text 'Name: Engineering Connected Systems' and 'Date: 30/10/2019'. The 'List' column contains a document icon. The 'Download CSV' column contains a download icon and an Excel icon.

Event	List	Download CSV
Name: Engineering Connected Systems Date: 30/10/2019		 

3. From this page, you can click the Excel icon to immediately download a list of booked attendees in CSV format.



4. Click the list icon next to the corresponding event to view a breakdown of delegates.



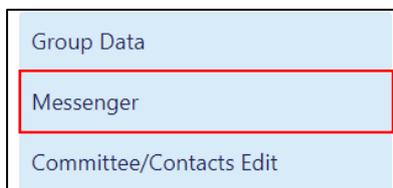
A screenshot of the 'Event Bookings List' page. It features a header 'Event Bookings List' and a summary box for the event. Below the summary box is a table with columns: ID, Name, Position, Email, Phone, Diet, and Notes. The first row of the table contains the following data:

ID	Name	Position	Email	Phone	Diet	Notes
18762	Mr James Retell	Name: Big Company Co Role: IT Specialist	Sarwar.Ahmad385@mod.gov.uk	029992 999 928		None

Messenger System – Creating An Emailer

Group admins can generate and send emailers out to members of their group without going through the Secretariat.

1. Choose 'Messenger' from the admin menu.



2. You will see a list of your previously generated emailers. You can edit/send an emailer using the links next to the corresponding message.
3. Click the '+ Create New Message' to open up the emailer editor.
4. Add a suitable Subject.

A screenshot of a text input field with the placeholder text 'Subject'.

5. Use the HTML editor to create your emailer. More functions are available by clicking the '...' icon in the editor.



6. Attach up to 2 documents to the emailer (You will need to first upload them to the group documents area using the Document Upload page).

A screenshot of a form section for attaching documents. It starts with the instruction: 'Use the 'Document Upload' page in the admin side menu then attach them below.' There are two attachment slots. The first is labeled 'Attachment 1:' and has a dropdown menu showing '<None>'. The second is labeled 'Attachment 2:' and also has a dropdown menu showing '<None>'. Both dropdown menus have a small downward arrow on the right side.

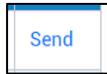
7. Click the 'Save Message' button.



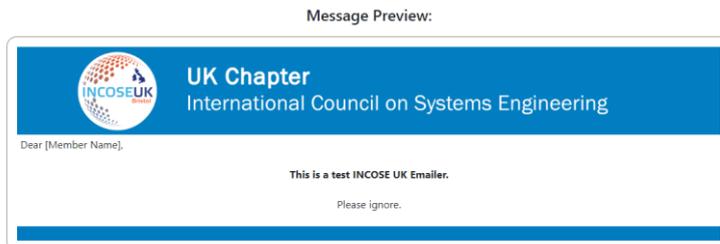
¶ Images can be embedded in emailers using the Base64 format (meaning you don't have to upload the image separately) but please note that Base64 support in email clients is limited and images may not appear in some clients. You can alternatively link to images on other websites or [contact the webmaster](#), who can upload the image to the INCOSE UK site and provide a URL.

Messenger System – Sending An Emailer

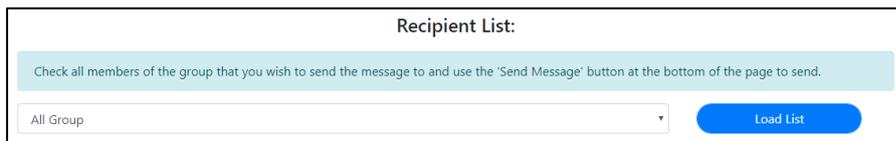
1. On the group messenger page, click the corresponding 'Send' link next to the emailer you want to send.



2. A preview of your message will be shown at the top of the page.



3. 'All Group' will be automatically loaded. This is everyone in your group who is an INCOSE UK member and the additional group 'non-members'.



4. Click the dropdown to also choose between only Members or only Non-Members. Click 'Load List' to load in the mailing list.
5. From the list of people, you can choose to send to specific people by selecting the tick box next to their name. Alternatively, to select all, click the tick box in the header.

ID	Member No.	Name	Email	<input type="checkbox"/>
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6. Click 'SEND MESSAGE' to send to all selected people.



7. We recommend you send a test emailer to yourself to check formatting is correct, before sending to the whole group.

Editing Group Committee/Contacts page

1. Choose 'Committee/Contact Edit' from the admin menu.



2. A list of all current live contacts is listed.
3. Click the pencil icon next to a contact to edit.



4. Click the red bin icon to delete.



5. To add a new contact, click the '+ Add New Contact' button. A blank entry will be added to the top of the list. You can then edit this entry, adding all the information of the new contact.
6. You can change the order of your contacts by using the 'List Order' field. They will appear in numerical order. However, the blank entry (Jane Bloggs) is set to always appear at the top until you change the data. This is to prevent you having to scroll to the bottom of the page when a new entry is added.



7. Don't forget to save by clicking the green save icon.

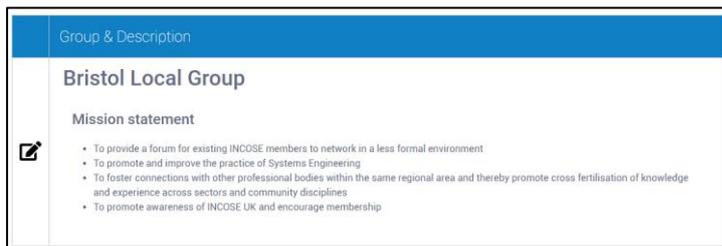


Editing Group Overview Page

1. Choose 'Overview Edit' in the admin menu.



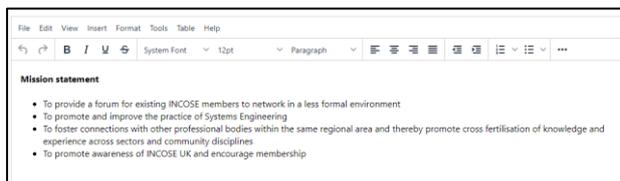
2. A preview of your overview page will be displayed.



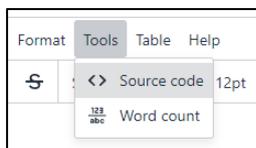
3. Click the pencil icon to enter editing mode.



4. Use the HTML editor to format your page. You can click the '...' for additional formatting options.



5. You can also edit the source HTML by clicking 'Tools' in the menu, then 'Source Code'



6. Don't forget to click the green save button.



⚠ Although we allow you to edit the complete design and layout of your group overview, we request all sub-headings are using the 'Heading 4' option. In addition, please ensure all links are set to open in a new tab.

If you are in any doubt, please contact the [webmaster](#).

The INCOSE UK website uses the Bootstrap 4 framework. Please visit the [Bootstrap website](#) to see a selection of components you can use on your group page. Examples from the website can be pasted into the source code.

Using the Group Wikis

1. Select the group page.



⚠ Not all groups have Wikis.

2. A button to their wiki will be displayed at the top of their overview page.



3. Login using your normal INCOSE UK details.

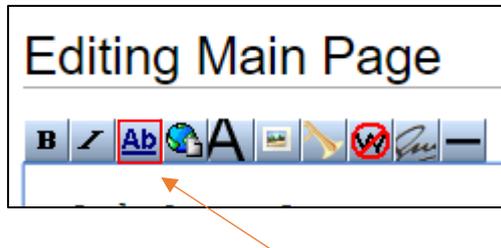
Editing a Wiki page

1. To edit a page, click the 'Edit' tab.



Adding a page to the Wiki

1. To create a page, you need to first 'create a link' to it on another page. For example, edit the Main Page by clicking the edit button, then use the 'Ab' button to create a link.



2. Clicking this will insert dummy text into two sets of square brackets (`[[Link title]]`). Change this text to what you want your new page to be called.

`[[Example Page]]`

3. Click the 'Save page' button, then click the new red link you've created.
4. This will take you to the newly generated page. To finalise creation of the page, add some content then click the 'Save page' button.



5. The previous link you created should turn blue once content had been added to the new page.



FAQ

How do I add a member to my group?

Group admins cannot add INCOSE UK members to their group. Instead, they should suggest members visit the 'My Interest' page on the 'My INCOSE UK' area of the website. Here they can request to join the group and the group admin will be able to accept/decline the request.

How do I upload Word documents to the group?

Only PDFs and PowerPoints can be uploaded to the site for security reasons. You can convert a word document into a PDF by going to File, Export, then 'Create PDF/XPS Document'.

How do I add additional admins to the group?

Administrators can only be added by the INCOSE UK Secretariat.

How can I send out emailers to members of other groups of INCOSE UK?

If you wish to send out an emailer to a wider audience than just your group, you must contact the Secretariat.