

U-MAS User Manual

U3A BRIGHT DISTRICT

CONVENORS

INTRODUCTION

The U-MAS membership management system is widely used by U3A's in Victoria. For U3A convenors, U-MAS provides a wide range of features including generating reports and emailing course participants.

This user manual is intended to provide quick and easy instructions for the most common U-MAS tasks.

ACCESS LEVELS

All members of U3A Bright have the facility to login and check their details etc and have an appropriate access level. Ordinary members have level "0" so can only access their own details and sign up for courses.

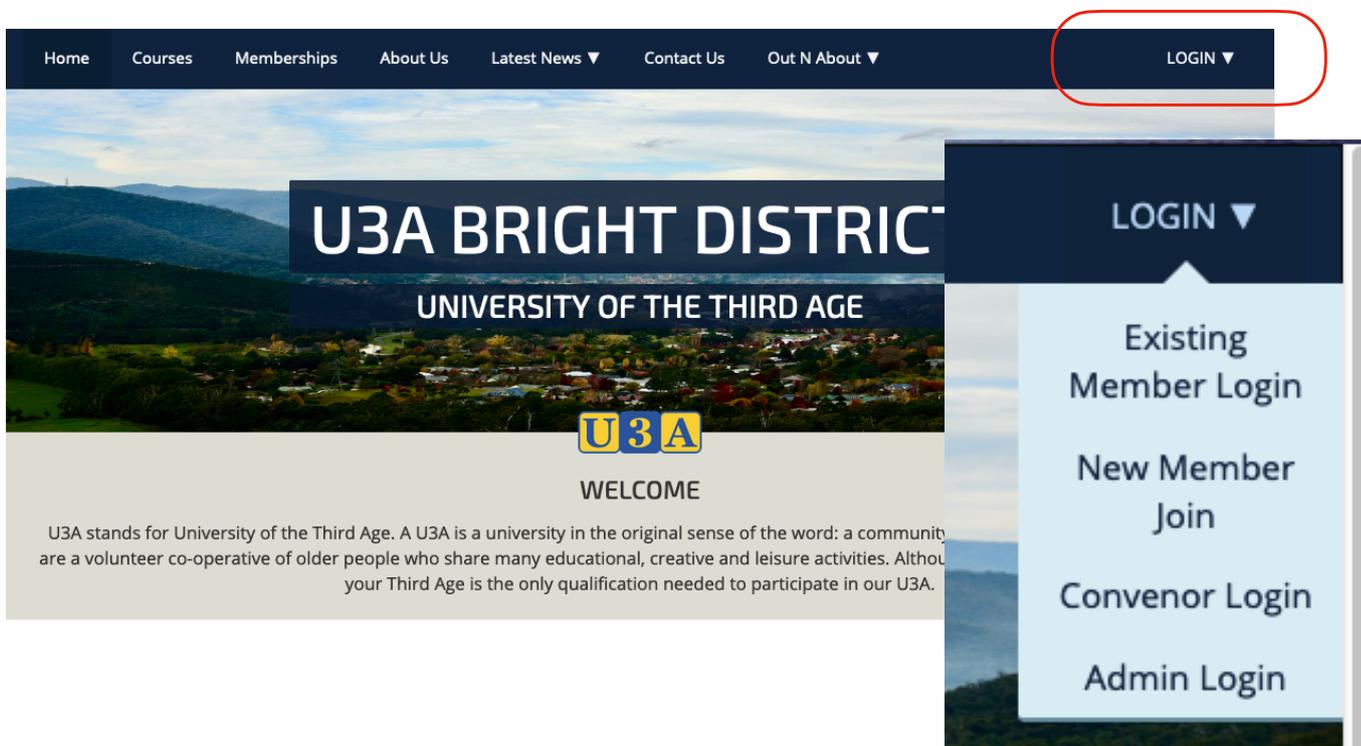
As a convenor your level is set to 4. This allows you to access details only of those members enrolled in your course.

You will be able to view your enrolments to check if they are active members, print attendance lists and mass email your participants.

Your convenor coordinator has access level 1 so can carry out a greater number of tasks such as correcting any member details in any course - though members will be able to log in and check only their own details . Level 1 is also responsible for adding or updating all course details.

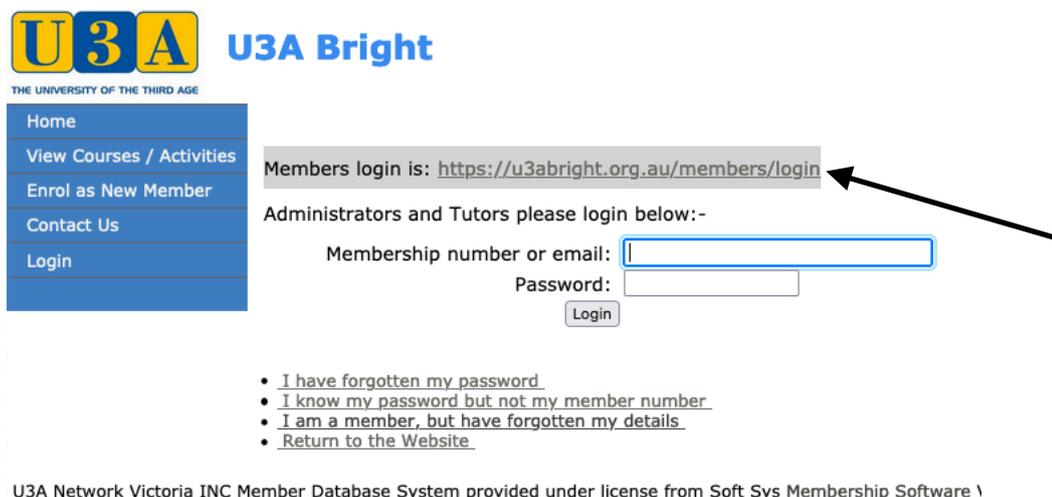
Logging In and Out

Open your browser and go to the website - u3abright.org.au. On the top menu bar you will find various drop down menus and on the far right you will find LOGIN with a drop down menu.



This is where all members of U3A Bright login to check their details and enrol in a course. New members may also join U3A Bright by clicking the NEW MEMBER JOIN button.

Convenors log in using the CONVENOR LOGIN button and Administrators use ADMIN LOGIN



You will be presented with this screen. Ignore the hyperlink as this will redirect to members login.

Type in your membership number and password and open this screen which will have your name and members number after the word **Welcome**

U3A THE UNIVERSITY OF THE THIRD AGE **U3A Bright**

Welcome

Members
To view and check Membership details click 'View Member Details'
To add or change Membership details click 'Edit Member Details'

Courses / Activities
To select and enrol in Courses / Activities click the 'View or Select Courses / Activities' menu item

Tutor
INC welcomes proposals for new Courses / Activities. If you have any particular fields and would like to share please volunteer and contact us for Courses / Activities'

opportunities to assist in many different areas within our organisation including reception, catering, maintenance and administration. To enquire please contact Us - General'

You are presented with a list of options on the left where you can view and send emails to your course attendees.

To Log out simply click on the bottom option. This will take you back to the login screen. If you wish to return to the website you will need to click on the tab in your browser bar or click on the Return to Website . The membership system is configured to open in a new tab.

Course Attendance List with Dates: Print or Email

Click REPORTS on the left side of the Menu. You will be presented with a screen with a number of tabs. Only two tabs are available - COURSES/ACTIVITIES and ENROLMENTS

Timetables

Today's timetable - schedule

Show Tutor names:

This date:

All classes Morning (till 12 noon start) Afternoon (after 12 noon start) Headings after 18 rows

Hide closed/finished courses:

Hide Admin only Courses:

Yearly timetable - schedule (and clashes)

Select a year:

Sort by:

Choose a Location:

Hide closed/finished courses:

Hide Admin only Courses:

Course Calendar dates need to be set up for each Course for the Timetable to list correctly
Ctrl P to print the report
Use Control + and Control - to resize screen (Using Edge, hold Ctrl and roll the mouse wheel back or forward)

Yearly weekly timetable - 1/2 (or 1/4) hour schedule (and clashes)

Enter a date from: Enter a date to: dd/mm/yyyy

The date from must be before the course start date

Start time: Minimum time 08:00

Finish time: Maximum time 22:00

Choose a Location:

Hide closed/finished courses:

Hide Admin only Courses:

Hide Time display:

Create 15 minutes times:

Create a CSV file:

Course Calendar dates need to be set up for each Course for the Timetable to list correctly
Cancelled dates will not be shown. A full report may take some time.
Ctrl P to print the report
Use Control + and Control - to resize screen (Using Edge, hold Ctrl and roll the mouse wheel back or forward)

These reports above will very rarely be required by a Convenor. A course Booklet has been generated for the year and is available on the website in the Courses tab.

Reports

Members **Subscriptions** **Courses / Activities** **Enrolments** **Financials** **Admin**

Enrolments

Lists the members within the selected Course. The reports have multiple options to display additional information

Choose a Courses / Activities:

Include Wait Listed: Show Address: Show Emergency contact : Email the Convenor:

Choose a sort order:

Attendance

Choose a Courses / Activities:

Select Courses / Activities Dates between: and: will appear on the list.

Include Wait Listed: Choose a sort order:

Email the Convenor: Create a PDF: Extra horizontal lines on list:

Match up columns with dates:

Creating a PDF will generate a new page with the PDF downloaded or open, depending on browser settings.
This is used when the spam settings do not allow a wide email body to be sent. Popups must be allowed.
This PDF can be attached to your emailer and sent.

The Enrolments tab allows you to select your course (only the one you are listed as convenor) to check your attendees. It is a good idea that when someone new comes to class you ask if they are a member of U3A. If they have only just joined they are allowed to attend 2 sessions as a try out then they must be a financial (active) member to continue.

Some convenors may find it useful to use an attendance list

To print an attendance list, click on Enrolments tab, scroll to Attendance section.

To configure the report:

1. Find your course in the drop down list (only yours will show)
2. Enter the required date range. It is best to print only for 1 term or month and not the whole year.
3. Choose a sort order. Eg First Name or surname
4. Tick or untick to email the convenor
5. To create a pdf click on "Create pdf"
6. To include extra blank rows enter the number of extra lines required
7. Tick or untick to match column with dates to adjust the report's format - try both to find one suitable
8. Click on attendance list

Members Subscriptions Courses / Activities **Enrolments** Financials Admin

Enrolments

Lists the members within the selected Course. The reports have multiple options to display additional information

Choose a Courses / Activities:

Include Wait Listed: Show Address: Show Emergency contact : Email the Convenor:

Choose a sort order:

[List Enrolments](#)

Attendance

Choose a Courses / Activities:

Select Courses / Activities Dates between: and: will appear on the list.

Include Wait Listed: Choose a sort order:

Email the Convenor: Create a PDF: Match up columns with dates:

[Attendance list](#)

Creating a PDF will generate a new page with the page open depending your browser settings.
 This is used when the spam settings do not allow popups. Popups must be allowed.
 This PDF can be attached to your emailer and sent to you depending on browser settings.

list:

Member number

Creating a pdf will generate a new page with the page open depending your browser settings. Popups in your browser must be allowed for this to work. Pdf can be emailed.

A course enrolment list may also be generated using the same process

1. Select your course
2. Tick the appropriate boxes
3. Click List Enrolments

[List Enrolments](#)

You may find this report useful at the beginning of term/year especially for outdoor activities that will require you to have emergency contact details etc.

As a convenor you also have access to run reports on courses available or create a course booklet showing all available for the year or a specific date range. This booklet has been generated at the beginning of the year and is available on the website for download.

Shortcodes

Using shortcodes in your emails allows you to send a number of identical emails and include personalised details such as names, member numbers, addresses etc.

There is a strict format for these codes. You **MUST** use **square brackets** at the beginning and end of each code and the wording within the bracket **MUST** correspond with various fields in the database. These have been set by the developer.

Code List

[member_no]	Membership number
[first_name]	First name
[surname]	Surname
[preferred_name]	If a preferred name is set
[email]	Email address
[street1]	Street address
[street2]	Street address (2nd if shown)
[suburb]	Town
[state]	State
[postcode]	Postcode
[subs_date]	Subscription date
[member_type]	Member type (full or associate)
[phone_home]	Home phone number
[phone_business]	Business phone number
[mobile]	Mobile number
[emergency_contact]	Name of Contact for emergencies
[contact_number]	Phone number of emergency contact
[relationship]	Relationship
[join_date]	Date first joined
[join_year]	Year of joining
[active]	Active member or Inactive member

You will find these codes at the bottom of the Enrolments screen

Setting up Your First Email

Along with this email you will find attached a .jpg file of the Bright U3A Logo and a copy of the footer that will need to be put on every email you send out. Once this is set up then you can use this template for all your emails.

Select "Send Emails" from the left sidebar and you will be presented with this screen

You will see a blank email setup. In this you will need to import the Logo (.jpg file supplied) and adjust the size. Do this by putting the file where you can easily access it (desktop) and click on the Easy Insert Image Icon (right hand arrow). This will bring up another screen where you should find your image. (You may need to navigate to the appropriate folder) Click on OPEN and your image file will be inserted into your email header.

Tab down a line then click on Insert Horizontal Line. (Middle arrow)

Tab down a line and insert the Shortcode to address the recipient. See list of shortcodes on the previous page. It is imperative that when typing these they are ACCURATE.

Generally you will use Dear [preferred_name].

(We use preferred name as some members may have this and an official First Name. If you use preferred name it will revert to First Name automatically if there is no preferred name.)

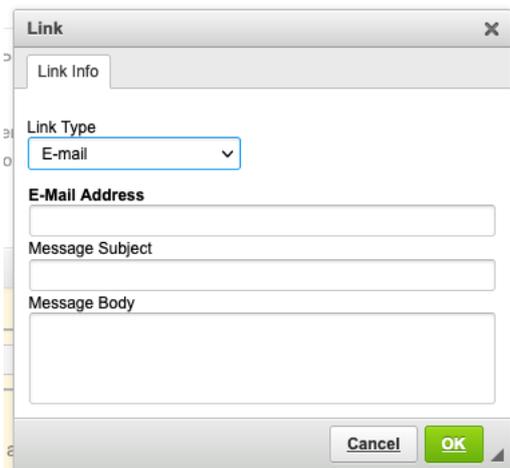
You can Write the body of your email as usual using the Styles, Fonts and Sizes as you wish. You then can put your signature and details at the end of the email. If you wish to have a U3A Signature we can provide one for you.

Underneath that use the Insert Horizontal Line (Middle arrow)

Below this you type the text seen below.

This is an automated e-mail message from U3A Bright District Inc.
You have received this e-mail because you are a member of U3A Bright District Inc. If you no longer wish to receive these, please send an e-mail to members@u3abright.org.au with the word “Unsubscribe” in the subject.

You should also make the text no bigger than 9point type.



You will also need to ensure that the email address is hyperlinked. Find the chain symbol further to the left of the Insert Horizontal Line, click on it, this screen appears. Find Link type dropdown, select email then type in the e-mail address members@u3abright.org.au and OK.

Once you have completed the template set up send an email to yourself only.

Go to the next box down where you will find “Send where member number is between “0” and “999999”. Type YOUR OWN member number into BOTH boxes and hit Send Active Member emails

This screen will appear and if you are sure the email is correct click YES.

Sending emails from BRIGHT DISTRICT U3A INC members@u3abright.org.au
If you selected an attachment, the file type must be valid.

1 records found to process

You have a delay of 1 minute per 6 emails set. This could take a while to process. 2000 = 5.56 hrs

The emails will process in the background. If a popup screen does not appear please start it off from the Emails Sent Tab: **See the status of emails in progress** button. You may continue with other work.

Popups must be enabled.

CAREFUL, if you click on Yes the email you have created for members will be sent immediately?

Yes

No

You will receive this email as a test and will now be saved into the system for accessing again for future emails. All you then need is to type in the body of the text you wish to send next time.