THE UNIVERSITY OF THE THIRD AGE

USING YOUR U3A WEBSITE

GROUP LEADERS' GUIDE

CONGLETON & DISTRICT U3A

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CONTENTS

1   Background

Work on the new website for Congleton & District U3A began in the Summer of 2014 following recommendations made by the IT Forum, which was established to look at how we could utilise modern technology in order to ensure that we continued to function. The website provides a more secure data base to hold members' details, with much easier administration requirements, and will also allow individual members not only to browse information, but to be able to interact in various ways with Congleton U3A and its Groups.

Each member of Congleton U3A, upon enrolment, is asked to provide a range of basic Personal Information, including details of their e-mail address. Providing an e-mail address will give members of the U3A Committee and Group Leaders a quick and easy method to contact members so, wherever possible, members are encouraged to make use of this facility.

Those members who do provide an e-mail address are issued with a unique Membership Number and an initial Password which enables them to interact and communicate via the website. You will be able to access the website from your desktop or laptop computer, or any web-enabled device such as iPads, tablets, or smart-phones.

Those members who have provided e-mail addresses will be able to log in to the website and, as well as review information, they will be able to interact using the system, including -

- the ability to register interest in, and join, an organised Group
- send e-mail to Group Leaders or Committee members
- send e-mail to other Members (without needing to know their e-mail address)

Members who have not provided an e-mail address will, of course, be able to visit the website and view information but they will not be able to make use of the above interactive functions.

As a Group Leader, what you require of the website will, of course, differ from those who are only Members of Congleton U3A since, in addition to being members of the organisation, you have also volunteered to lead Group activities. Therefore, when you login to the website, you will also have access to whatever additional data and functionality you need in order to perform your agreed rôle.

This Guide will provide you with detailed instructions on how to access the available functions within the current Test & Development version of the website as well as what to do if you encounter any problems.

If, after a period of using the website, you think of any possible improvements to the website functionality, to make your rôle easier, for example, then we would be grateful if you will submit these to the Committee Member with responsibility for Technical Support, via e-mail to technical.u3a.congleton@gmail.com.

All suggestions received will be evaluated with regard to feasibility and their relevance to the activities of other Groups and Group Leaders, and we will keep you informed of any decision on their possible future implementation.

Finally, **but very importantly**, can we please remind you that our Members, in providing us with their Personal Data, do so on the understanding that we will protect their privacy regarding the submitted information. As a Group Leader you will have access to a wide range of information held on the website and, under the requirements of the Data Protection Act as a person who has access to such data, you are under a duty not to disclose that information to any third party nor to use that data for any purpose other than that required to perform your rôle as an authorised Group Leader.

2 Login to the Congleton U3A Website as a Member

2.1 What do I need to Login to the Website ?

Basically you need two things -

- your U3A Membership Number - which will be sent to you upon enrolment
- a Password which you should also receive when you enrol

Both of these pieces of data will remain unchanged as long as (a) you remain a member of Congleton U3A or (b) until you decide to change your initial Password to something more memorable to yourself.

If you have forgotten or mislaid your password, you will need to follow the "Forgotten Password" procedure (see section 2.4) to receive a new password.

2.2 Logging In to the Website

Find the Congleton U3A Test Website using your web browser by entering the web address **http://www.congletonu3atest.org.uk** directly into the address bar of your web browser and then pressing the Enter or Return (↵) key.

Alternatively, if you are reading this Guide as a PDF file on your computer, just click on the address above to go directly to the website.

Note that, although the website has not been deliberately hidden from general view, it has not been particularly publicised either, so that a search for the Test & Development version of the website by using Google, Bing or other search engines is very unlikely to produce any results. In due course, when all features have been fully tested, it will replace, and be accessible at, the same address as the current Congleton U3A website (www.congletonu3a.org.uk).

Having found the website, you will see the Home page, and a Welcome message, as shown below, will be displayed.

Once you have read the message, just click on the red cross in the top right-hand corner, and the message will disappear.
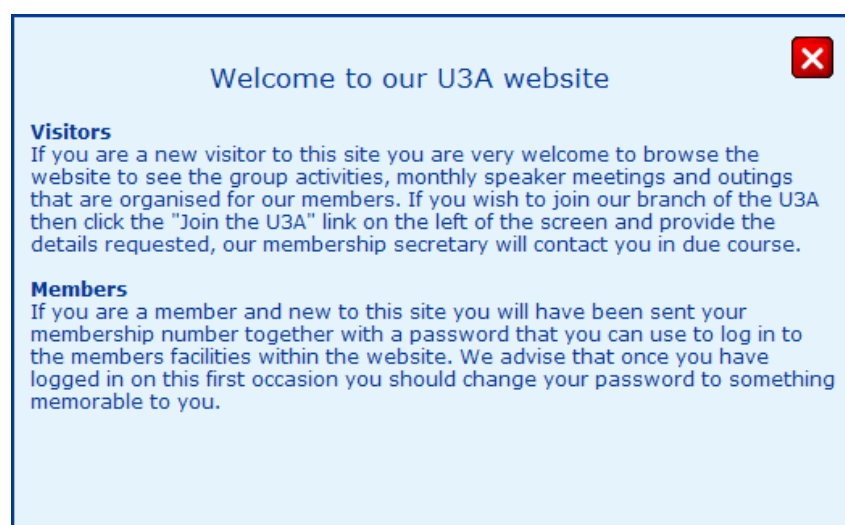
You will be able to browse the various items displayed under the headings "U3A Menu" and "Message Board" in the Public area without logging in, as shown on the following page -

To access the Members Only area, and enjoy all the available functionality, click on the button "Login" which is located on the gold button bar, just below the bottom right-hand corner of the U3A logo, as indicated by the **red** arrow added to the picture above.

A new window will then be displayed -

In the field labelled 'Membership No.', enter your Congleton U3A Membership Number.

In the field marked 'Password' enter your initial password that was sent or e-mailed to you (or, if you have subsequently changed your password, then enter your changed version).

Having filled in both fields click on the "LOG IN" button – Note that pressing the Enter or Return (↵) key on your keyboard, which would normally log you in, will not work - you need to click on the "LOG IN" button (or first press the Tab (⇆)key, followed by the Enter key).

If you have entered either your Membership Number or Password incorrectly an error message will be displayed saying "INVALID LOGIN - TRY AGAIN", in which case re-enter the information carefully and then click again on "LOG IN".

If you have forgotten your Password just click on the link "Forgotten Password" and follow the instructions in section 2.4 below.

2.3 Logged-In Options & Changing Your Password

Having logged in, it might appear at first look that nothing has changed on the website Home page. However, if you look more closely, you will see a number of new options have appeared (outlined in **red** below). In particular, your name will be displayed above the gold button bar and you will now have the ability to change your password –

Your initial password will be a random set of characters and, as such, is likely to be meaningless and not very memorable. You may, therefore, wish to change your initial password to something you can remember, or indeed change it at any time in the future if, for example, you think that someone else has discovered your password.

You change your password by clicking on the button headed "Change Password" which is located along the gold button bar towards the centre of the screen –

Enter your old password in the field "Previous Password", then enter a new password in the field "New Password". Enter your new password again in the field "Confirm New Password" and then click on the "Submit" button – at present your new password has no restrictions on the number of characters used, and can include both lower and UPPER case alphabetic characters, together with numbers or symbols.

Note that the new password must be entered exactly the same in both "New Password" and "Confirm New Password" fields, or an error message will be displayed, and you will need to re-enter the chosen new password again in both fields.

2.4 Forgotten Your Password

In the event that you have forgotten your website password, the system can provide you with a new one. To obtain a new password, follow the procedure to login to the website (see section 2.2) and click on the option "Forgotten Password" on the Log In screen.

A new window will be displayed –

Here you should enter -

- the e-mail address you have provided to Congleton U3A as part of your Personal Details
- your Congleton U3A Membership Number

Next, click on the "Submit" button and the system will then send, to your e-mail address, a new, randomly-generated password which you can then use to login as usual.

You can, of course, thereafter choose to change your password to something more memorable by following the instructions in section 2.3 above.

2.5 Your Access within the Website

One of the benefits of the new website, from an organisational point of view, is that when someone logs into the website they will only be allowed access to that information and functions which are relevant to their needs as a member.

This, of course, means that all the data we need to have available about members, activities, meetings and funds (including, in particular, your Personal Data) remains at all times protected and can only be accessed by those authorised to do so - this level of security is applied quite transparently from your point of view.

3   What Can You Do on the New Website ?

Just as on the old website, by clicking on the various options and buttons, particularly those outlined in **red** in section 2.3 above, you will be able to review information about the U3A, about activities, see the latest news, etc.

Where you see text in blue and underlined on the screen, this denotes a "link" which means that, if you click on that text, the system will automatically link you to another screen or webpage.

The new website will also enable you to do much more than you could previously.

3.1   How the New Website Looks and is Laid Out

The new website screen is made up of three main areas, as shown on the next page (for the case where you are logged-in) -

Header - the area at the top of the screen which contains a number of buttons (on the gold bar) that allow you to access different sections of the website. When you click on one of these buttons, the information which is displayed in the **Contents** area changes to reflect your choice.

Menu   - the area to the left of the screen which contains a list of the most common sections of the website that users may want to access, such as -

- What Groups are running, where, and on what day
- Timetable information and a Diary of events
- News of Group activities and other events of interest

Contents displayed in this area of the screen do not change when you select either Header or Menu options (other than Logout).

On most pages, the Menu area also displays a summary of the most recent messages posted on the Message Board. The full text of the messages can be viewed by clicking "Message Board" in the Menu.

Content - the main area of the screen, where detailed information and photographs, etc., are displayed, depending on which option you have chosen from either the Header or Menu areas.

Also, at the top right of every web page, in the **Header** area, you will find a HELP ❓ button.

A click on this button will provide you with additional information about the contents of the page. The "Help" information is context-driven so that it always aims to be specific to the contents of the web page you are viewing at the time.

3.2 Interactive Features for Members

The new website provides a number of interactive features, all of which can be accessed using the links in the section headed "U3A Menu" in the Menu area.

As a Member of Congleton U3A you will from time to time wish to access these parts of the website simply as a Member, rather than in your rôle as a Group Leader. Details of all of the functions available to Members can be found in the "Members Guide", a copy of which can be accessed by clicking on the "U3A Forms" option located in the Menu area shown above.

3.3 Interactive Features for Group Leaders

As a nominated Group Leader, you will have access to a number of additional interactive features on the website, allowing you to manage the details and schedule for your Group, and to communicate with the Group members (and prospective members).

Initial details of your Group, with you as the nominated Group Leader, will be set up on your behalf by the Group Coordinator. Once this is done, you can edit and add to the details where necessary, before the Group is made available to Members to join. The sequence of steps to accomplish all of this is described in the following sections.

3.3.1 Types of Groups

Three types of Group can be created on the website, each with a slightly different set of facilities. These Group types are -

- Standard
- Payment
- Registration

A **Standard Group** is the type used for the majority of Groups, and features a website page giving details of the Group's activities, and where and when it will meet.

A **Payment Group** will be created where prior payment for a planned activity is required. It provides the same details as a Standard Group but, in addition, the website page sets out details of the payment required from a participating Member, either as a deposit and balance, or as a full amount, and the date(s) by which that payment must be made.

A **Registration Group** is used where a Group Leader wants Members to register an interest in a particular type of activity, and allows the Group Leader to e-mail all registered Members in order to advise them of a planned event, trip, or outing. This type of Group is intended to be used by Group Leaders organising theatre visits, day trips, holidays, or other excursions, for example.

3.3.2 Creating a New Group

In order for a Group covering a particular interest or activity to be available for Member to join, it is first necessary to create an entry for the Group within the website. The steps to accomplish this are as follows -

1. Following agreement by the Committee, where a new Group is to be established, the Group Coordinator will contact (or be contacted by) the nominated Group Leader to outline the basic details of the Group.

2. The Group Coordinator will create a "Draft" Group web page (ie. this will only include a minimum level of detail) and advise the Group Leader that the new web page is available – at this point, details of the new Group can only be viewed by the Group Leader (and Group Coordinator).

3. The Group Leader will access the Draft Group (see the following section 3.3.3) in order to review the initial details (as covered in section 0 and its subsections below), change any incorrect information and add any missing details, and then advise the Group Coordinator that the Group is ready to go "live".

4. The Group Coordinator will then change the Group status to "Live", at which point the Group web page and its details will become visible to Members, and the Group will appear in the appropriate Group lists.

3.3.3 Finding Your New Group on the Website

Once the Group Coordinator informs you that your Draft Group is available for review, login to the website and then click on one of the Group listing options in the "U3A Menu", as outlined in **red** below, where the page displayed after clicking on "Groups by Day" is shown –

Click the "Select Day" button on the gold button bar in the Header area, then click on the day that you have agreed with the Group Coordinator to run your proposed Group. If this is Wednesday, for example, the screen should appear as below, with a drop-down list of days -

Since, when you logged in, the system recognised you as the nominated Group Leader of the new Group, you should see, after clicking on Wednesday, your Group listed with Draft status (blue-grey background), as shown on the next page for the example Group "Advanced Word" -

Time	Group	Leader(s)	Frequency	Status
Wednesdays				
0900	Walking (Wednesday 1)	Richard Benson	Wednesdays for 50 sessions from 1st January 2015 to 30th December 2015	Apply to Join Group
13:00	R/C Model Aircraft	Ian Fraser	Wednesdays for 23 sessions from 8th April 2015 to 9th September 2015	Apply to Join Group
14:00 To 16:00	Advanced 'Word'	Jock Wild	Monthly on 2nd Wednesdays from 13th May 2015 for 5 sessions	Apply to Join Group

Note: Within the various Group listings, Groups will, as appropriate, be shown with different coloured backgrounds as follows -

White	Groups with a white background are "Open" and will have a status either "Apply to Join Group", or "Fully Subscribed, Join the Waiting List".

Pink	Groups with pink background are "Closed" and have a status of "Fully Subscribed"

Blue-Grey	Groups with a blue-grey background have been created with a "Draft" status and are not yet visible to Members

As an alternative to finding your Group by the day on which it meets, you can click instead on "Groups by Category" in the Menu to show a web page on which all Groups are collected in sections by area of interest.

This time, as shown on the following page, there is a "Select Category" button on the gold button bar in the Header area, which, when clicked, displays a drop-down list of defined Group categories –

Click on any Category to display a list of all Groups within that area of interest.

In the Menu area you can also click on "Groups by Title" to display a page with all Groups shown in alphabetic order by the assigned Name of each Group, as below –

Finally, you have the choice of clicking on "Groups by Venue" which displays a listing of all Groups shown in alphabetic order by the place where each Group will meet, as displayed on the next page -

At the present time, there is not a "Select Venue" button on the gold button bar in the Header area, so you will have to scroll down the page until you find the location agreed for your Group meetings, and hopefully, the entry for your Group.

3.4 Managing Groups

3.4.1 Reviewing Details of a New Group

Having found your new Group (as described in section 3.3.3 above), created in draft form for you by the Group Coordinator, your first task is to review the Group Details page.

First, click on the name of your Group in the displayed list of Groups ("Advanced 'Word'" for our selected example here) to view the Group Details as they will be seen by Members when they access the website – except that Members will not see the row of icons below the Group Details header. These icons, used to amend the Group information, are only visible to yourself and the Group Coordinator –

Your task now is to review all of the displayed information, check that is accurate, and then correct or add to it as necessary. To do this, you will use the row of icons at the top of the page -

The use of each of the icons, when clicked, is as follows -

This displays the Group Details in a set of textboxes which you can edit each particular entry, covering the Group's activities, meeting times, meeting dates, venue, etc., as described in the section 3.4.2 below.

This **deletes all of the Group Details, and the Group itself, from the system**, so that its use must obviously be treated with much caution ! If the icon is clicked, a request for confirmation will be displayed –

Please confirm that you wish to delete Advanced 'Word'
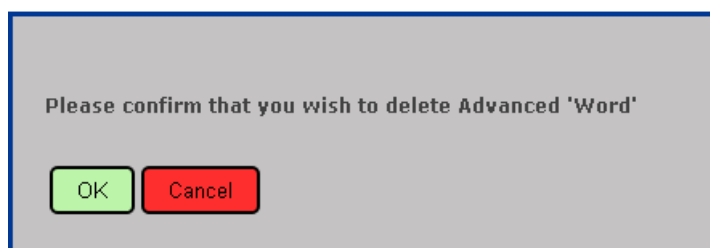
OK   Cancel

Click on the green **OK** button to delete the Group completely (no recovery is possible) or on the red **Cancel** button to leave the state of the Group Details unchanged.

This creates a "draft copy" of the existing Group Details page. Its primary use is to generate a Group covering the same activity in readiness for inclusion in the Congleton U3A programme for the next year's session

Click this if you wish to attach (or remove) a document in PDF format to (or from) the Group Detail page so that it can be accessed (or not) by Members of the Group

You can use this to access the Group's Meeting calendar to allow you to "tweak" the meeting dates which have been automatically generated by the system when the draft Group Details page was created – this lets you delete or adjust dates to take account of holidays or other circumstances

Click this to access the list of Group Members – initially, this is a list of those wishing to join the Group and, subsequently, will be those Members who have been accepted, or whose application has been declined, or are on the waiting list to join the Group

Use this icon to access a page where you will be able to send an e-mail message to all Group Members who have provided an e-mail address

This is used to add or remove a photograph or image which is placed in the top right-hand corner of the Group Details page

When starting to review your new Group Details, the first thing to do is to check the text of the Group Description, making sure that it is accurate and represents the way you intended to portray the Group's activities, and that there are no spelling or grammatical mistakes.

Next, check that the dates, times, and venue are as intended (and as agreed with the Group Coordinator). If you need to change any of the Details, click on the editing icon ( ).

This will take you to a page where each of the Group Details is displayed in its own field or textbox and can be altered or updated as required, as shown in the following section 3.4.2, which describes in detail how to edit each of the individual details.

3.4.2 Editing Group Details

The Group Details editing page is shown below, with the initial entries for the Draft Group -

Note that, if you make any changes to the contents of any of the fields or textboxes then they will only take effect, and be transferred to the Group Details page, when you click on the green **OK** button at the foot of the page. If you do not wish to make any changes, or to discard any changes that you have made, then clicking on the red **Cancel** button will simply return you to an unaltered Group Details page.

The use of each of the editing textboxes is described below –

Title   Give the Group a meaningful title, if the one provided initially is incorrect, remembering that this is how the Group will be known to Members - this is a **mandatory** field.

First Leader   This will have been completed by the Group Coordinator, but check that the entry is correct and, if not, contact the Group Coordinator - this is **mandatory** field.

Second Leader   If there is to be a second Leader for the Group, click in the textbox and start to type the name of the Member who is to have this position – a drop-down list will appear with names matching the characters you have typed so far. When the required name appears, click on it to select the Member, and their name (and membership number) will be entered to the field. The second Leader will not automatically receive e-mail messages sent to the Group Leader, although Members can e-mail them directly by name - this is an **optional** field.

Note : If a name is entered here by mistake, simply click in the textbox to highlight it and then press the Delete key on your keyboard to remove the name.

Meeting Venue   Click on the down-arrow (▼) at the end of the field, and select the venue, as agreed with the Group Coordinator, from the drop-down list, at which the Group is to meet (if No Venue is selected then no entry for Venue: appears in the Group Details - and the Group will appear at the top of the displayed list of Groups when the Menu option "Groups by Venue" is clicked) - this is a **mandatory** field.

Start Date   Click on the calendar icon (▦), located to the immediate right of the field, to select the date of the first meeting of the Group from the displayed calendar - this is a **mandatory** field.

End Date   Click on the calendar icon (▦), located to the immediate right of the field, to select the date, from the displayed calendar, of the last meeting of the Group within the current Congleton U3A year. Where the Group operates on a term-by-term basis, it is recommended that you enter the LAST date within the U3A year and subsequently use the Meeting Date Adjustment function on the Group Details page (see section 3.4.5 below) to remove any out-of-term dates - this is a **mandatory** field.

Closing Date   Click on the calendar icon (▦), located to the immediate right of the field, to select the latest date, from the displayed calendar, by which Members must have made their application to join your Group - if no date is selected then the system will allow members to join the Group at any time - this is an **optional** field.

Application Date   Click on the calendar icon (▦), located to the immediate right of the field, to select the date, from the displayed calendar, from which the Group is "open" ie. available for Members to apply to join - if no date is selected then the system will allow members to apply to join the Group immediately - this is an **optional** field.

Meeting Frequency   Click on the down-arrow (▼) at the end of the field, and select the appropriate frequency for Group Meetings from the drop-down list – use the "Periodically" option where the meeting schedule does not fit the "Weekly", "Fortnightly", or "Monthly" options, and then use the Meeting Date Adjustment function on the Group Details page (see section 3.4.5 below) to adjust the list of dates generated by the system - this is a **mandatory** field.

Day of Meeting   Click on the down-arrow (▼) at the end of the field, and select the appropriate day of the week for Group meetings from the drop down list - this is a **mandatory** field.

No. of Sessions   Enter the number of planned sessions for the Group - this is an **optional** field, since the system will calculate the number of sessions automatically from the entered start and end dates and frequency information.

Week in Month   This field is only relevant when the "Meeting Frequency" has been set as "Monthly" - for example, if the Group is to meet every 2nd Tuesday in the month, you would enter 2 in the textbox - this is a **mandatory** field for Monthly meetings only.

Time of Meeting   Enter the starting and ending times for the Group meeting using a 24-hour clock convention - eg. 3.00pm would be entered as 15:00 - these are **mandatory** fields (although this is not currently enforced by the system).

First Category   Click on the down-arrow (▼) at the end of the field, and select the most appropriate Group Category from the drop-down list - this is a **mandatory** field.

Second Category   This field will normally be left blank but could be used if you wish the Group to appear in a second Category – in such a case, click on the down-arrow (▼) at the end of the field, and select the appropriate Category from the drop-down list - this is an **optional** field.

Description   Enter a short outline of the Group's area of interest and activities in the textbox, including, where appropriate, examples or specific topics, etc. You should also include information about any competencies a Member will need to join the Group, ranging from, perhaps, 'No previous experience required' or, for example, for an advanced language Group, that a Member must have attended courses in the language at a lower level, or have some equivalent experience.
This paragraph will be the main source of information for prospective Members looking at Groups they might join, so it is important to take care in composing its contents - this is a **mandatory** field.

Display Telephone   Click on the down-arrow (▼) at the end of the field, and select either the "Yes" or "No" option to set whether the telephone number(s) of the Group Leader(s) will be displayed, or not - this is a **mandatory** field.

Total Places in Group   Enter the maximum number of places which will be available to Members who wish to join the Group - if no value is entered then the number is set at zero - this is a **mandatory** field.

Waiting List Size   Enter the maximum number of Members you will allow to join the Waiting List once the Group is full. The default value is 5, but you can enter any number from 0 to 999 - this is a **mandatory** field.

Status   This field (Draft or Live) can only be set by the Group Coordinator, and is used to make the Group visible to Members (and visitors to the website) once all of the Group Details have been updated and confirmed.

When you are satisfied with the contents of all fields, click on the green **OK** button located at the bottom left-hand corner of the page to save the entered information and return to the Group Details page. Clicking the red **Cancel** button will discard any changes before returning you to the Group Details page. Note that you can return to the Change Group Details page as often as you like, to make any further edits. This can be useful when you are not quite sure of the effect of making a particular change – just return to the Group Details page, check that the

change has had the desired effect (or not), and then continue making further edits, if necessary, by clicking on the editing icon ( ) again.

Once you are happy that all Group Details are correct, inform the Group Coordinator that you are ready for your new Group to be revealed to Members. The Group Coordinator, after a final check, will then change the Group Status to "Live" so that it is accessible for Members to join.

Any changes to the Group Details page which are needed in future can be made by the Group Leader, using the facilities described above. However, you **must always advise the Group Coordinator** of any such changes, to ensure that they do not impact any other Groups.

3.4.3 Payment Group Details

As described in section 3.3.1, a Payment Group is created where prior payment for a planned activity, such as an outing or trip of some kind, is required. The Group Details are similar to those of a Standard Group but, in addition, the website page sets out details of the payment required from a participating Member, either as a deposit and balance, or as a full amount, and the date(s) by which that payment must be made. An example set of Details for a Payment Group are shown below -

Reviewing a Payment Group is done in exactly the same way as for a Standard Group, although generally there is only a single date for the activity, and there are additional fields dealing with the payment(s) required.

As for a Standard Group, check the text of the Group Description, making sure that it is accurate and that there are no spelling or grammatical mistakes.

Next, check that the date, time, and venue are as intended. If you need to change any of the Details, click on the editing icon (✎).

This will take you to a website page where each of the Group Details is displayed in its own field or textbox and can be altered or updated as required, as shown below –

U3A Contacts	Constitution	Change Password	Logout	Email Updates		HELP ❓

Change Payment Group Details

Title	Clonter Garden Party
First Leader	171 : Berwyn Jones
Second Leader	Start to type Name
Meeting Venue	Various Various ▾
Start Date	25/06/2015 🔲
End Date	25/06/2015 🔲
Closing Date	01/06/2015 🔲
Application Date	20/03/2015 🔲
Meeting Frequency	Weekly ▾
Day of Meeting	Thursday ▾
No. of Sessions	1
Week in Month	0
Time of Meeting	Start : [ ] Ends : [ ]
Total Cost	250.00 To be paid by 01/06/2015 🔲
Deposit	50.00 To be paid by 11/05/2015 🔲
First Category	Out & About ▾
Second Category	Select Category ▾
Description	Garden Party at Clonter
Display Telephone	No ▾
Total Places in Group	30
Waiting List Size	5
Status	Live ▾

OK   Cancel

Most of the fields are handled as described in section 3.4.2 for a Standard Group. The use of each of the editing textboxes for the additional Payment Group fields is described below –

Total Cost	Enter the full cost of the outing or trip here WITHOUT a preceding **£** symbol - this is a **mandatory** field.
To be paid by	Click on the calendar icon (▦), located to the immediate right of the field, to select the FINAL date, from the displayed calendar, by which you require FULL payment.
	This is a key date, as a joining Member is not a confirmed Member of this Group until they have paid the sum required in FULL. The system will use this date to generate automatically, two days prior to the due payment date, a reminder e-mail message to the Member - this is a **mandatory** field.
Deposit	Enter any deposit required, prior to full payment for the trip, here WITHOUT a preceding **£** symbol. If NO deposit is required then leave the field BLANK. The system will show, on the Details page that NO DEPOSIT is required - this is an **optional** field.
To be paid by	Click on the calendar icon (▦), located to the immediate right of the field, to select the FINAL date, from the displayed calendar, by which you require the DEPOSIT payment.
	This is a key date, as a joining Member cannot proceed to full payment until the sum required as DEPOSIT is paid. The system will use this date to generate automatically, two days prior to the due payment date, a reminder e-mail message to the Member- this is an **optional** field.

When you are satisfied with the contents of all fields, click on the green **OK** button located at the bottom left-hand corner of the page to save the entered information and return to the Group Details page. Clicking the red **Cancel** button will discard any changes before returning you to the Group Details page. Note that you can return to the Change Group Details page as often as you like, to make any further edits, by clicking on the editing icon (📝) again.

The process for handling applications to a Payment Group, and the subsequent payments, is described in section 3.6 and its subsections.

3.4.4 Registration Group Details

As described in section 3.3.1, a Registration Group is used where a Group Leader wants Members to register an interest in a particular type of activity, and allows the Group Leader to e-mail all registered Members in order to advise them of a planned event, trip, or outing. This type of Group is intended to be used by Group Leaders organising theatre visits, day trips, holidays, or other excursions, for example.

This type of Group has a lot fewer Details than Standard or Payment Groups, as shown in the example below -

Reviewing a Registration Group is done in the same way as for a Standard Group, although this only really amounts to a check of the text of the Group Description, making sure that it is accurate and that there are no spelling or grammatical mistakes, and that the Group Leader details are correct.

If you need to change any of the Details, click on the editing icon (🖊).

This will take you to a website page where each of the Group Details is displayed in its own field or textbox and can be altered or updated as required, as shown below –
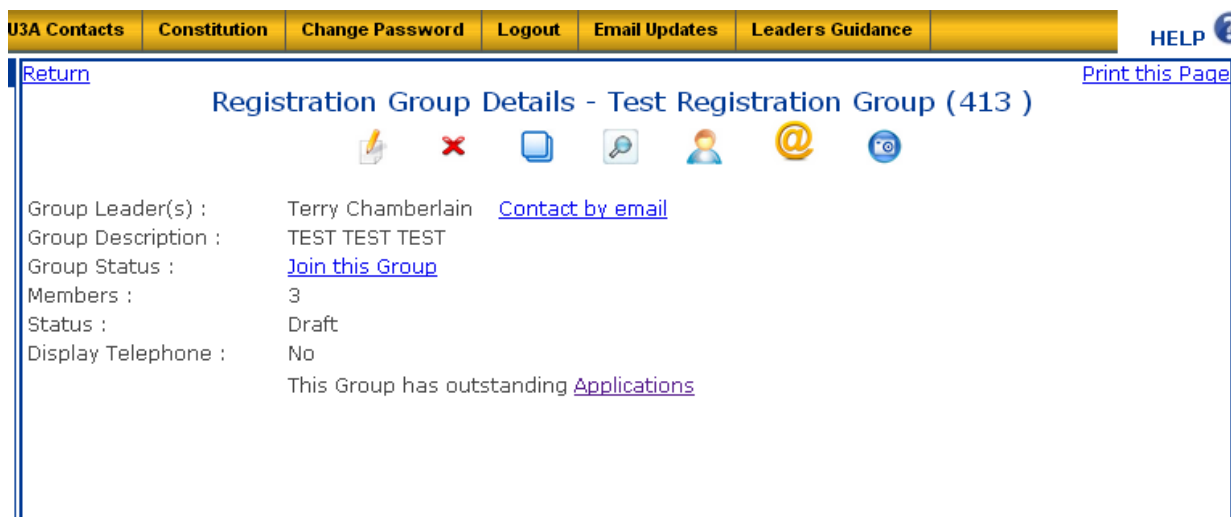

When you are satisfied with the contents of all fields, click on the green **OK** button located at the bottom left-hand corner of the page to save the entered information and return to the Group Details page. Clicking the red **Cancel** button will discard any changes before returning you to the Group Details page. Note that you can return to the Change Group Details page as often as you like, to make any further edits, by clicking on the editing icon (🖊) again.

Very little is required of the Group Leader regarding management of a Registration Group. When a Member wishes to join the Group, they simply click on the link "Join this Group" either in one of the Registration Group lists, such as in Groups by Category, or on the Registration Group Details page (to the right of Group Status:). The Member confirms that he or she wishes to join the Group by clicking "Confirm" when the window below is displayed (or, alternatively, click on "Cancel" to abandon the application) -
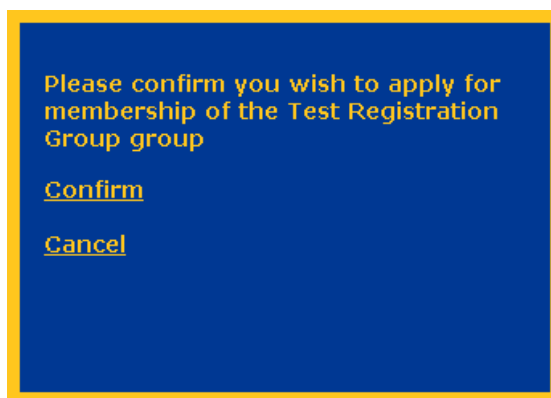
 - and is immediately added to the Group, with the message shown below being displayed for the Member's benefit –

3.4.5 Adjusting the Calendar of Meeting Dates

Depending on the choices you have made in setting the values for Start Date, End Date, Meeting Frequency, Day of Meeting, No. of Sessions, and possibly Week in Month, the system will generate a set of Group Meeting Dates at the bottom of the Group Details page.

These dates **need to be checked carefully** since the system generates a list of all possible Meeting dates, and takes no account of public holidays or other events, for example. This is particularly relevant where you have selected the Meeting frequency as Periodically, rather than Weekly, Fortnightly or Monthly.

If you need to correct the displayed list of Meeting dates, click on the Calendar (▦) icon near the top of the page to show the list in its own page, with a small checkbox next to each date, as in the example below -

Click on the checkbox to the left of each of the Meeting dates that you wish to be **removed** from the Group schedule, thereby placing a tick in the selected checkbox, then click on the green **OK** button to update the Group Meeting Dates, and return to the Group Details page. Check carefully again that the list of Meeting dates is correct as you intended. Clicking the red **Cancel** button will return you to Group Details with the list of dates unchanged.

Note that there is no direct way to let you to add **extra** dates to the list. If a required date is not shown, then you need to use the Edit function (✐) to alter the Start or End Dates, or set the Meeting Frequency to Weekly, for example, to generate a larger list of dates which does include all dates required. Then click once more on the Calendar (📅) icon to remove any dates which are **not** required, as described above.

Finally, return to the Group Details page and check that all the entered information is correct, and that the Group is shown with the correct details in the Groups by Day, Groups by Category, and Groups by Venue lists.

When you are completely satisfied that all your Group Details are correct, and that the page can be made available to the Membership, you **MUST** contact the Group Coordinator to request that the Group is made "Live".

3.5 Managing Group Membership

3.5.1 Applications to Join

Once the Group Details page has been made "Live" by the Group Coordinator, Members will be able to see the Group listed and, if interested, can click on the name of the Group and read the activity Details.

Those who are interested in joining the Group can apply by clicking the link "Apply to Join Group", either in one of the Group lists, such as in Groups by Category, or on the Group Details page (to the right of Group Status:). As usual, a window will be displayed asking the Member to confirm their application –
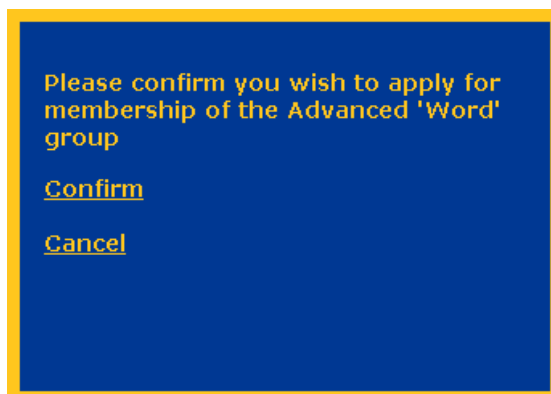
Clicking on "Confirm" will then display an acknowledgement message to the Member –
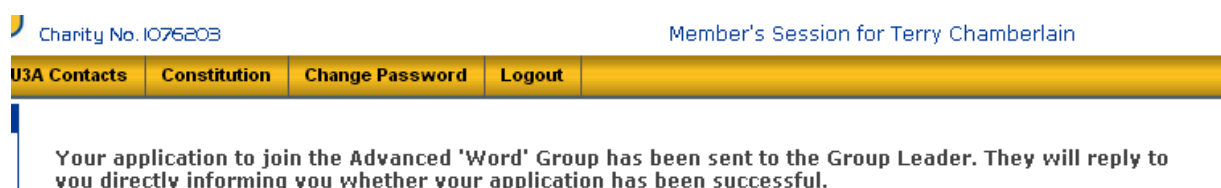
 - and will also automatically generate an e-mail message to be sent to the person nominated as "First Leader" for the Group, with the content as shown below -
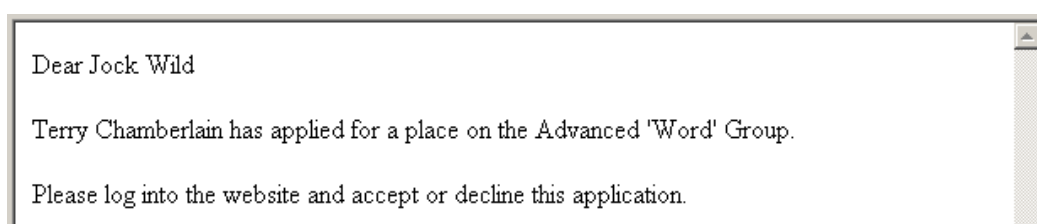
As a Group Leader, when you receive these requests to join your Group, you will need to respond by either accepting or declining their membership.

3.5.2 Accepting or Declining Membership Applications

To accept or decline a Member's application, after receiving the e-mail notification, login to the website as usual, locate your Group in one of the lists, such as in Groups by Day, and click on the Group name to display the Group Details page, as shown on the next page -

| U3A Contacts | Constitution | Change Password | Logout | Leaders Guidance | | HELP ❓ |

Return   Print this Page

Group Details - Advanced 'Word' (448)

✏️ ❌ 🗂️ 🔍 📅 👤 @ 📷

Group Leader(s) :   Jock Wild   Contact by email
Group Description :   Using 'Word' to create structured documents such as user guides or instruction manuals
Group Status :   Apply to Join Group
Venue :   St John Ambulance HQ, West Road, Congleton, Cheshire,, CW12 4ES
Frequency   Monthly on 2nd Wednesdays from 13th May 2015 for 5 sessions
Time of Session :   14:00 to 16:00
Start Date :   Wednesday 13th May 2015
End Date :   Wednesday 9th September 2015
Category(s) :   Computing
                           Discussion groups
Group Size :   10
Max Waiting List :   5
Vacancies :   9
Status :   Draft
Display Telephone :   No
                           This Group has outstanding Applications

Show Map of Venue Location

Group Meeting Dates

Wednesday 10th June 2015   Wednesday 8th July 2015   Wednesday 12th August 2015
Wednesday 9th September 2015

Note that a new message "This Group has outstanding Applications" has appeared below the list of details, to remind you to take the appropriate action. Either click on the word "Applications" in the message or, at the top of the page, click on the "Update Group Members" icon (👤), to display a list of those Members who have applied to join the Group, together with those who have currently been accepted as members, as shown in the "Status" column in the example below -

| U3A Contacts | Constitution | Change Password | Logout | | HELP ❓ |

Return   Print your group members' detail

Members List for Advanced 'Word'   ➕

Name	Membership	Status			Contact Method	
Grant Bremner		Group Member			0126xxxxxxx email	❌
Ursula Leydecker		Group Member			0126xxxxxxx email	❌
Berwyn Jones		Group Member			0126xxxxxxx email	❌
Eugene Dempsey		Group Member			0126xxxxxxx email	❌
Dawn Russell		Group Member			0126xxxxxxx email	❌
Terry Chamberlain		Applied	Confirm	Decline	0162xxxxxxx email	❌
Susan Chamberlain		Waiting List	Confirm	Decline	0162xxxxxxx email	❌

To accept an applicant as a member of the Group, click on the "Confirm" option. The status shown for the Member will change to "Group Member" and the system will automatically send that Member an e-mail message confirming their application to join the Group has been accepted, as shown below -
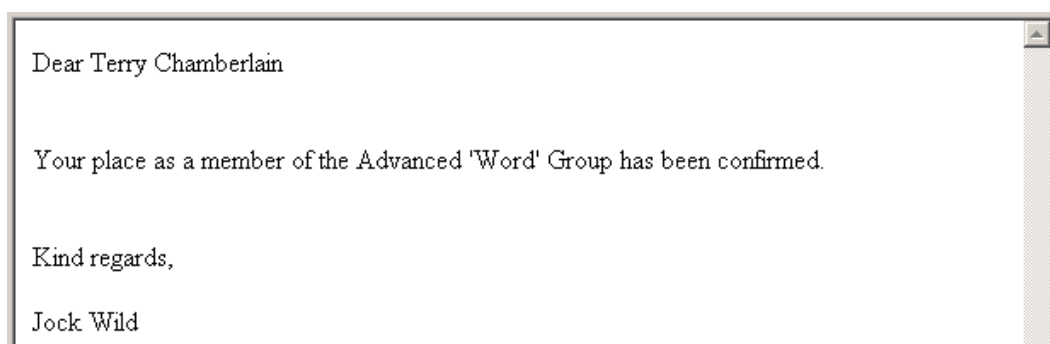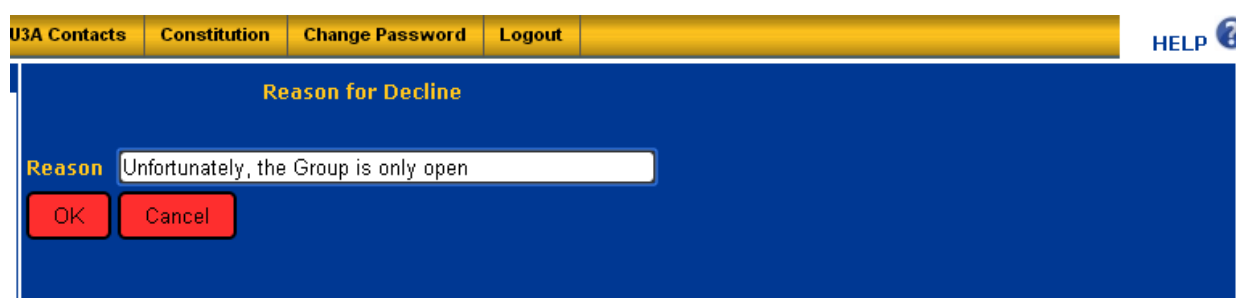
If a Member has applied to join the Waiting List of a Fully Subscribed Group, then their status will be shown as "Waiting List", as shown in the example above. Before you click "Confirm" in this case you must be certain that there is an available space in your Group. If no space is available, then leave the Member on the Waiting List by NOT clicking on any option.

Click the link "**Return**" in the top left-hand corner of the page to return to the Group Details page.

Declining a Member's request to join the Group is likely to be a more unusual occurrence, and you need to think carefully before clicking on the "Decline" option. You may, for example, know of some very good reason that the Group would be inappropriate for the Member, as in the case of walking or sports Groups which require a reasonable level of fitness of the Member.

In any event, before declining a Member's request to join your Group, you should discuss the issues with the Group Coordinator and all decisions should be handled with tact and diplomacy. Before you consider clicking on the "Decline" option it is recommended that you discuss any concerns with the Member, either face-to-face or by telephone, and, hopefully, get their agreement that joining the Group is not appropriate in their situation – at least for the present.

When you do click on the "Decline" option, a new page will be displayed, which allows you to type a brief explanation, in the textbox labelled "Reason", of the reason for declining the Member's application -

Click on the **OK** button when you have finished typing (or **Cancel** to abandon the process) to change the status shown for the Member to "Declined", as shown on the following page –

The system will also automatically generate and send an e-mail message to the Member, confirming that their application to join the Group has been declined, as shown below –
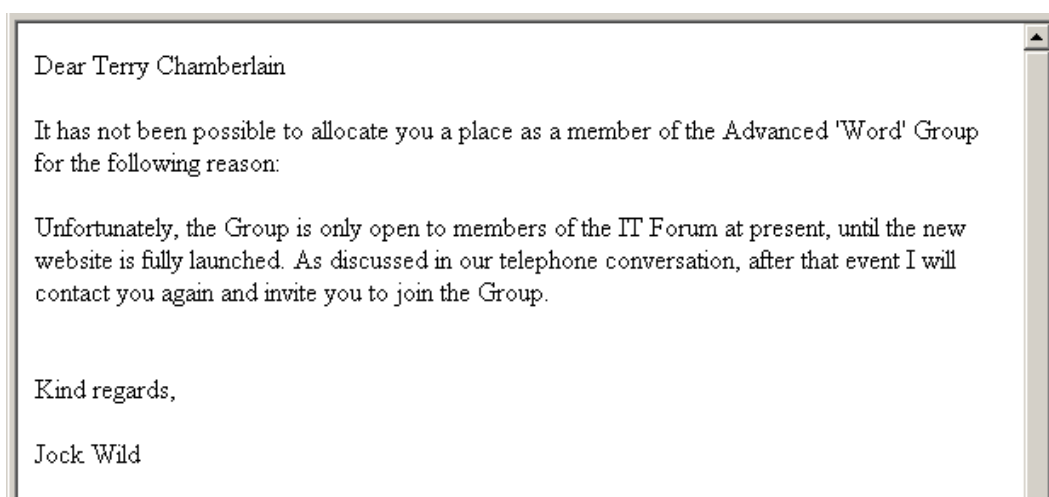
At any point in the process of sorting out Membership Applications for your Group you can click on the link "**Print your group members' details**" in the top right-hand corner of the page to obtain a list of Group Members which can be sent to a printer attached to your computer.

How this list will appear on your computer screen, and the consequent sequence of steps necessary to print it, depends very much on which browser you are using to view the website (Internet Explorer, Google Chrome, Mozilla Firefox, etc.). If you encounter any difficulties, please contact the member of the Committee responsible for technical matters, by e-mail at technical.u3a.congleton@gmail.com, for further assistance.

3.5.3 Adding Members Directly to the Group

Note that, as a Group Leader, you have the facility to add Members directly to your Group, provided that they are currently Members of Congleton U3A. The main use for this facility will be when you need to add those Members who enrolled in person for your Group on Enrolment Day, or when a Member without online access applies to join your Group.

However, in other circumstances, you should only use this facility if there are very good reasons why the Member in question cannot apply to join the Group in the normal way, and you have discussed the situation with the Group Coordinator.

To add a Member to the Group, click on the large ✚ icon at the top of the page to display a new page as shown below –

U3A Contacts	Constitution	Change Password	Logout		HELP ❓

Add a Member to this Group

Member to Join Group | Start to type Name

OK   Cancel

Click in the textbox showing the text "Start to Type Name" and start to type the name of the Member you wish to add to the Group. A drop-down list with possible matching names is displayed. Continue typing until the list is sufficiently small to allow you to click on the required Member's name –

U3A Contacts	Constitution	Change Password	Logout		HELP ❓

Add a Member to this Group

Member to Join Group | kennet

OK

Kenneth Allway
Kenneth Blackburn
Kenneth Bleakley
Kenneth Capps
Kenneth Coe
Kenneth Macdonald
Kenneth Moss

- which will then be entered to the textbox, together with the Member's Membership No. –

U3A Contacts	Constitution	Change Password	Logout		HELP ❓

Add a Member to this Group

Member to Join Group | 1363 : Kenneth Macdon

OK   Cancel

Click the green **OK** button to add the Member to the Group membership list, or the red **Cancel** button to abandon the operation. When the Member is added to the list, their Status will be

shown as "Applied" and you should then click on the "Confirm" (or "Decline") option to allow the system to send that Member an e-mail message confirming (or declining) their membership of the Group, as described previously.

### 3.5.4 Members Leaving the Group

In addition to accepting or declining Membership requests to join the Group, you may, from time to time, be informed that an existing Member (for whatever reason) wishes to withdraw from membership of your Group.

In this case (after confirming their wishes) you should remove the Member from the list of Group members since, if they remain listed, any e-mail communications that you send out to the Group members would also be sent to them.

To remove a Member from the Group membership list, login to the website as usual, locate your Group in one of the lists, such as in Groups by Day, and click on the Group name to display the Group Details page. Next, click on the "Update Group Members" icon (![icon]), to display the membership list.

Locate the leaving Member's name in the list, and then click on the red cross (✖) to the right of their details (see the example above) to remove their name from the list of members.

A window will then be displayed where you will be asked to confirm the removal of the Member from the Group, as shown on the next page –
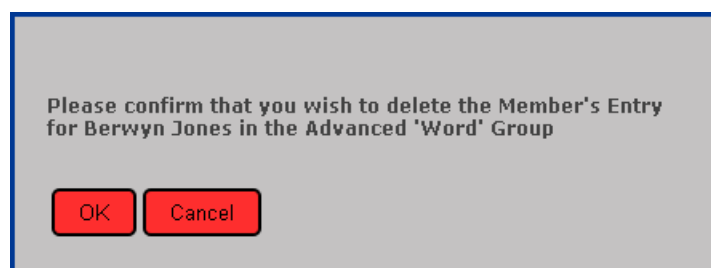
Click the **OK** button to remove the Member's details form the Group, or **Cancel** to leave the list as it was.

3.5.5 Sending E-Mail Messages to All Group Members

The new website incorporates a simple facility to allow a Group Leader to create and send an e-mail message to all current members of their Group who have provided an e-mail address in their Personal Information supplied to Congleton U3A and have, by doing so, agreed to receive such e-mail messages.

To send a message to all Group Members, login to the website as usual, locate your Group in one of the lists, such as in Groups by Day, and click on the Group name to display the Group Details page. Next, click on the "Email Group Members" icon (![@icon]), to display a new page as shown below –

You can change the contents of the "Subject Line" simply by clicking in the textbox, deleting the default text "Message from Group Leader . . . ", and typing your own required Subject text. Then type the contents of your message in the "Message" textbox.

If you wish you can add up to four Attachments (documents or pictures) to your message by clicking on a "Choose File" button, and then selecting a file using the Open File dialogue window which will be displayed. Wait a few seconds for the upload of the selected file to complete before making any other changes to the message.

When you are satisfied that the message is complete, and you have checked that it does not contain any errors, as shown in the example on the following page –

- send it to all Group Members by clicking on the green **OK** button.

Each Member of the Group will receive a copy of the message addressed only to their own individual e-mail address, and with the name of the Group Leader added automatically by the system, as shown below –

Please review the attached draft of the Guide and either e-mail me your comments or bring them along to next Monday's meeting

Jock Wild
Group Leader
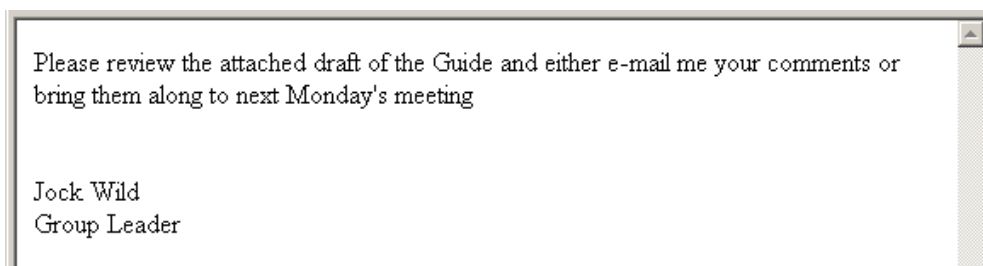
The received message does not contain the addresses of any of the other Group Members nor any indication that it has been sent to multiple recipients.

3.5.6 Contacting an Individual Group Member

For each Member of a Group, the Group Leader will be able to view, in the list of Group Members the following information -

- Name

- Telephone Number (if they provided this as part of their Personal Information)

- E-Mail Address (if they provided this as part of their Personal Information)

However, when you click on the "Update Group Members" icon (), to display the list of Members, if there are no details displayed under "Contact Method" for a particular Member, then that Member has elected not to be contacted by Congleton U3A by either telephone or e-mail. In such a case you will need to contact the Membership Secretary who will give you details of the Member's Preferred Contact Method (probably Letter).

Where a telephone number is provided, but no e-mail address, then you should contact the Member, when necessary, by telephone.

However, where the Member has provided an e-mail address in their Personal Information supplied to Congleton U3A and have, by doing so, agreed to receive such e-mail messages, you can contact them by clicking on the "email" option under "Contact Information" to the right of their name in the Group Member List.

This action displays a new web page as shown on the following page –

You can change any part of the displayed information simply by typing alternative text into the appropriate textbox. It is unlikely you would want to edit your name, but you are free to enter an alternative e-mail address if you wish. This will then be the e-mail address seen by the Member receiving the message, and the one to which they can send any reply. You can also choose to delete your e-mail address, in which case, the Member will be unable to respond by e-mail.

Similarly, you can provide an alternative telephone number at which you would like the Member to contact you – or you can delete the telephone number completely. **However**, you must leave **either** an e-mail address **or** a telephone number in the message or the message will not be sent.

Type a more appropriate subject for the message in the "Subject Line" textbox and then the body of your message in the "Message" textbox. If required, you can add up to four Attachments (documents or pictures) to your message by clicking on a "Choose File" button, and then selecting a file using the Open File dialogue window which will be displayed. Wait a few seconds for the upload of the selected file to complete before making any other changes to the message.

When you are satisfied that the message is complete, and you have checked that it does not contain any errors, click on the green **OK** button to send the message – or click on the red **Cancel** button to discard it completely.

3.6 Managing Payment Groups

3.6.1 Payment Group Options

As described in sections 3.3.1 and 3.4.3, a Payment Group is created where prior payment for a planned activity, such as an outing or trip of some kind, is required. The Group Details are handled in the same way as those of a Standard Group, with the additional tasks of dealing with the payments required from participating Members, either as a deposit and balance, or as a full amount, and the date(s) by which these payments must be made.

To illustrate these tasks, an example Payment Group set up for a trip to the Edinburgh Festival will be used, where a full payment of £399 is required, either in full, as shown below -

- or, alternatively, with a £50 deposit -

Start Date :	Friday 21st August 2015
End Date :	Sunday 23rd August 2015
Closing Date :	Friday 24th July 2015
Application Date :	Friday 15th May 2015
Total Cost :	£399.00 Final date for payment : 24th July 2015
Deposit :	£50.00 Final date for payment : 12th June 2015
Category(s) :	Out & About

Members apply to join the trip by locating the relevant entry in one of the Group lists, such as Groups by Category, and clicking on the "Apply to Join Group" link, as shown on the following page –

When a Member applies to join the Group, the Group Leader receives an e-mail notification of the event, such as that shown below –
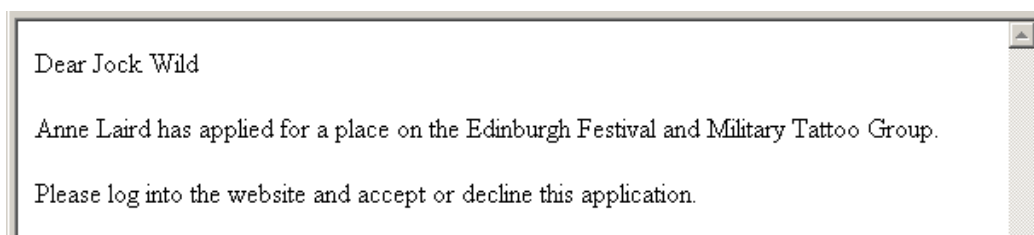
 - and will then login to the website to review the application(s).

3.6.2 No Deposit Required – Accepting or Declining Membership

To accept or decline a Member's application, after receiving the e-mail notification, login to the website as usual, locate your Group in one of the lists, such as in Groups by Category, and click on the Group name to display the Group Details page. Next, click on the "Update Group Members" icon (), to display a list of those Members who have applied to join the Group, as shown in the example below -

To accept a Member's application, the Group Leader clicks on the "Provisional" option next to their name. This action generates an e-mail message to the Member, confirming that their place on the trip has been provisionally reserved, pending receipt of full payment by the due date, as shown on the following page –

The Members List page is also updated to reflect the Member's provisional acceptance –

The system will automatically generate a reminder e-mail message to a provisionally-accepted Member two days prior to the required payment date, if payment has not yet been received and acknowledged by the Group leader.

In any case, once the full payment has been received, the Group Leader returns to Members List page (by clicking on the "Update Group Members" icon ( )from the Group Details page), and clicks the "Fully Paid" option next to the Member's name. The status of the Member is then updated to "Group Member", as shown below –

- and an e-mail message is sent automatically to the Member to advise them that their place in the Group for the trip has now been confirmed, as shown on the following page –
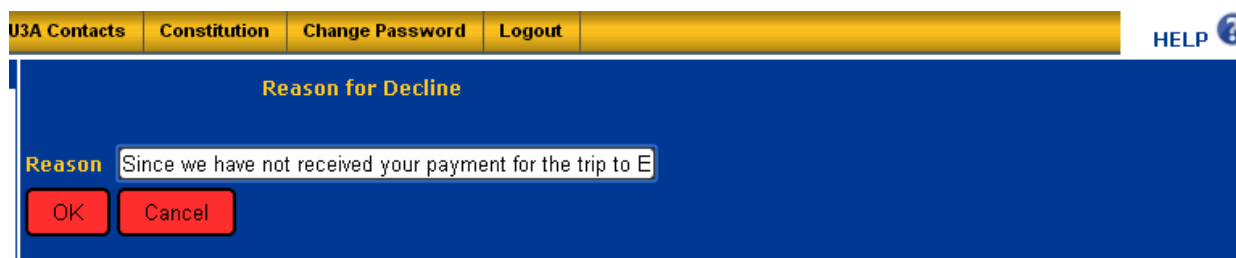
Dear Anne Laird

I have received your full amount of £399.00 to join Edinburgh Festival and Military Tattoo,

We look forward to seeing you at the event
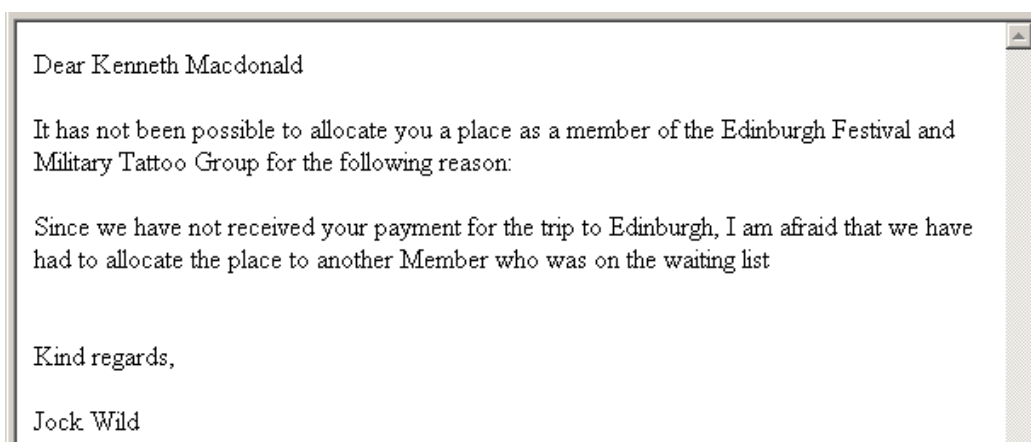
Kind regards,

Jock Wild
Group Leader

On the other hand, if a Member who has been provisionally accepted for the Group fails to pay the due amount by the due date, the Group Leader may choose to decline their application and offer the place to another Member who may be on a waiting list for the Group. This should only be done after you have attempted to contact the Member and have confirmed that they are unable (or unwilling) to attend the event.

To cancel the Member's application, click the "Decline" option next to the defaulting Member's name in the Member List, to open a new page where the Group Leader is required to enter a reason for declining the Member's application to join the Group, as shown below –

| U3A Contacts | Constitution | Change Password | Logout | | HELP ❓ |

Reason for Decline

Reason Since we have not received your payment for the trip to E

OK   Cancel

Clicking the **OK** button then sends an e-mail message to the Member to advise then of the decision, as shown below –

Dear Kenneth Macdonald

It has not been possible to allocate you a place as a member of the Edinburgh Festival and Military Tattoo Group for the following reason:

Since we have not received your payment for the trip to Edinburgh, I am afraid that we have had to allocate the place to another Member who was on the waiting list

Kind regards,

Jock Wild
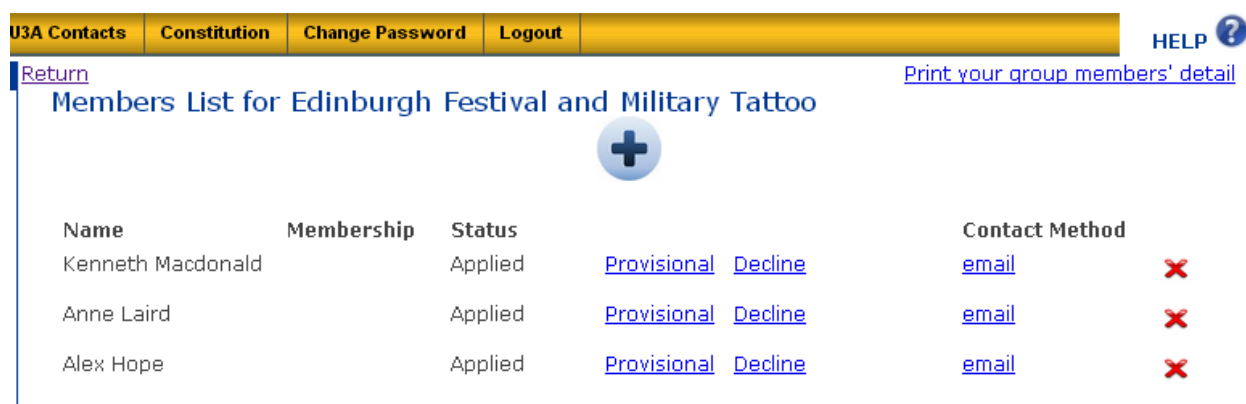
- and the Members List is updated to reflect the resultant Group status –

| Name	Membership	Status		Contact Method	
Kenneth Macdonald		Declined		email	✖
Anne Laird		Group Member		email	✖

3.6.3 Deposit Required – Accepting or Declining Membership

To accept or decline a Member's application, after receiving the e-mail notification, login to the website as usual, locate your Group in one of the lists, such as in Groups by Category, and click on the Group name to display the Group Details page. Next, click on the "Update Group Members" icon (👤), to display a list of those Members who have applied to join the Group, as shown in the example below -

To accept a Member's application, the Group Leader clicks on the "Provisional" option next to their name. This action generates an e-mail message to the Member, confirming that their place on the trip has been provisionally reserved, pending receipt of the specified deposit, followed by full payment, by the due dates, as shown below –
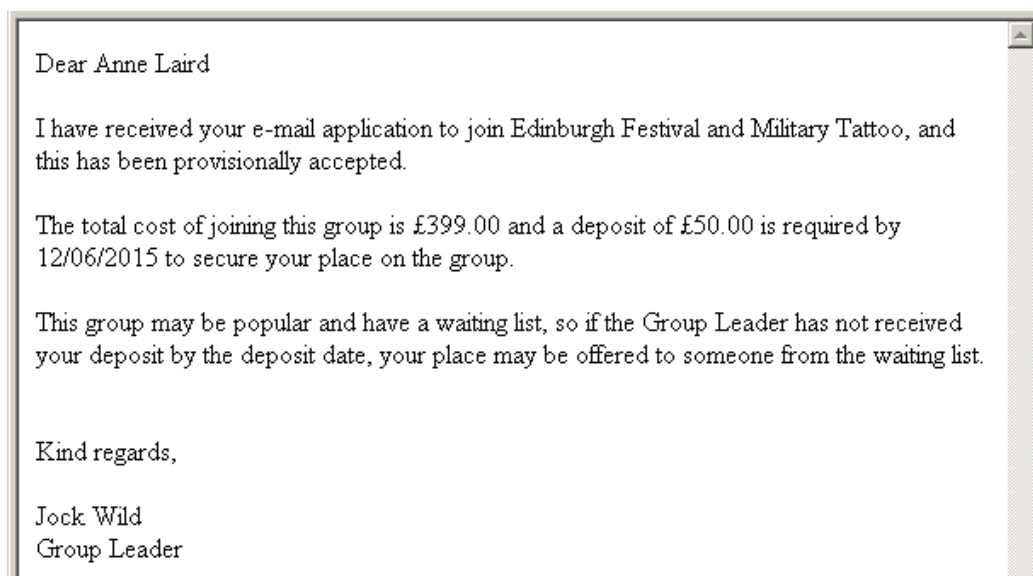
The Members List page is also updated to reflect the Member's provisional acceptance, as can be seen on the following page, where options "Deposit Paid" and "Fully Paid" now appear next to the accepted Member's name, showing that their deposit and final payments are awaited in due course –

The system will automatically generate a reminder e-mail message to a provisionally-accepted Member two days prior to the required deposit payment date, if the required deposit has not yet been received and acknowledged by the Group leader.

When the Group Leader receives notification of payment of the deposit from a Member, the Group Leader returns to Members List page (by clicking on the "Update Group Members" icon (👤)from the Group Details page), and clicks the "Deposit Paid" option next to that Member's name. The status of the Member is then updated to "Balance to Pay", as shown below –

- and an e-mail message is sent automatically to the Member to acknowledge payment of the deposit, and reminding them of the amount of the balance required, as shown below –

Dear Anne Laird

I have received your deposit to join Edinburgh Festival and Military Tattoo,

The remaining cost of joining this group is £349.00 and is required by 24/07/2015 to secure your place on the group.

This group may be popular and have a waiting list, so if the Group Leader has not received your remainder by the due date, your place may be offered to someone from the waiting list.

Kind regards,

Jock Wild
Group Leader
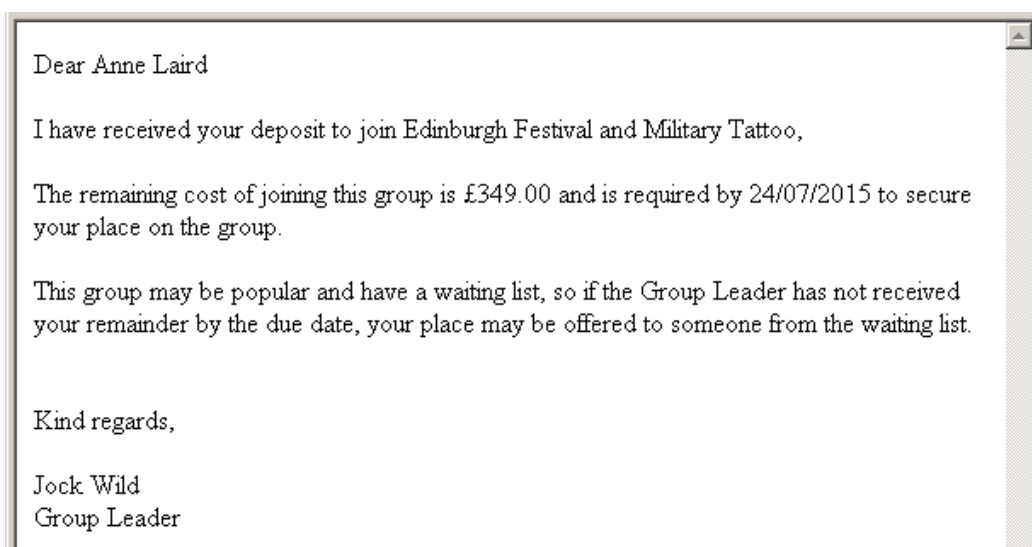
The system will automatically generate a reminder e-mail message to the Member two days prior to the required full payment date, if the balance of the cost of the trip has not yet been received and acknowledged by the Group leader.

When the notification of payment of the balance is received from a Member, the Group Leader returns to the Members List page and clicks the "Fully Paid" option next to that Member's name. The status of the Member is then updated to "Group member", as shown below –
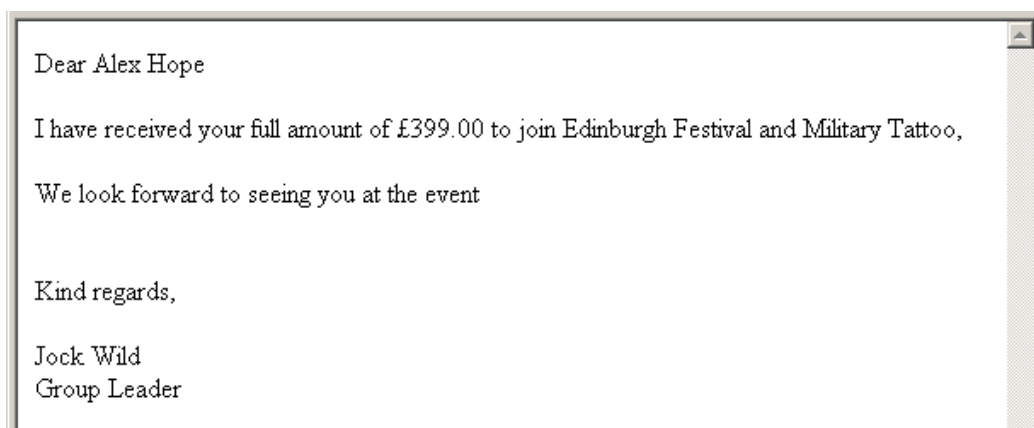

 - and an e-mail message is sent automatically to the Member to advise them that their place in the Group for the trip has now been confirmed, such as that shown below –

On the other hand, if a Member who has been provisionally accepted for the Group fails to pay the deposit amount by the due date or, having paid a deposit, fails to pay the balance in time, the Group Leader may choose to decline their application and offer the place to another Member who may be on a waiting list for the Group. This should only be done after you have attempted to contact the Member and have confirmed that they are unable (or unwilling) to attend the event. In the case where the deposit has been paid, the Group Leader must make arrangements with the Treasurer to refund this amount to the Member.

Cancellation of the Member's application is performed exactly as described in the preceding section 3.6.2, by clicking on the "Decline" option next to the defaulting Member's name in the Member List, and entering the reason for declining the Member's application to join the Group.

This Guide has been produced in order to provide Group Leaders with a closer insight into the inner workings of our new website.

It should make it easier for those with basic computing skills to manage enrolment into their Groups, and communicating with enrolled Members. However, we recognise that some of our Group Leaders may still have difficulties in working with this system.

If any Group Leader requires assistance then they should, in the first instance, contact via e-mail the member of the Committee who is responsible for technical matters at the following address –

technical.u3a.congleton@gmail.com

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