a) Viewing your Group Record

To view the **Group Record** for your Group, click on the Group name in the Groups List (see GL.1), or elsewhere where Group names are shown. Groups for which you are a Leader or for which you have editing rights are highlighted blue.

Each Group Record comprises four sub-pages:

- **Details** see below
- **Schedule** see GL.3
- **Members** see GL.4
- **Ledger** see GL.5

You can select between these on the row beneath the Group Record title. The active sub-page has its name in black.

Details   **Schedule**   **Members**   **Ledger**

Note: The things that you can view and the operations that you can perform may differ from those described below, according to the System Access and Privileges allocated to your Role by your U3A Committee.

b) Editing the Group Details

The Group **Details** page holds basic information about the Group, including **Faculty** (optional) and **Status** (Active or Inactive).

Some of the details on this page are used to populate fields when Events are created on the **Schedule** page (see GL.3) and will appear in the **Groups List** (see GL.1) and **Calendar** (see GL.9). Hover the cursor over the fields to display details about what to enter in each field (also refer to the descriptions below).

- The **When** field is free text and used only to give general information about when the Group meets, e.g. "2nd Thursday", or "Weekly, Wednesdays" or "ZOOM" as an online example.

The contents of this field are displayed in the **Meets** field of the Groups Lists on the Public Groups webpage and the Members Portal.

- The **Start time**, **End time** and **Venue** are optional and are used as defaults when **Events** are created.
- The **Contact** field can be used to give a person's name, telephone number or email address for enquirers to make contact, e.g. "Jane, 0123 456 7890". Be aware that this information may be visible to U3A members or the public, depending on how the Public Links are configured.
- **Max members** should be used if there is a limit on the number of members that the Group can sensibly accommodate. When the limit is reached, members may still be added via the Group's **Members** page and are shown with a *"waiting since"* date.
- **Allow members to join online** lets members join the Group (or waiting list) via the Members Portal.
- **Enable waiting list** lets members join a waiting list via the Members Portal if the Max members figure has been reached.
- **Notify Leader** allows the Group Leader to be notified by email when a member joins or leaves the Group or the waiting list.
- When populating the **Information** field, be aware that this information may be visible to U3A members or the public, depending on how your U3A's *Public Links* are configured.
- The **Notes** field is for private notes that are not displayed the public.

After editing any of the details make sure you press the **Save Record** button.