

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 GL.2
- **Schedule** see GL.3
- **Members** see below
- **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.



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 Members

The Group **Members** page holds contact information for the members of your Group.

- If a person is not a Current member (i.e. their membership has not been renewed for the current year), their name will show in red (see Sandi Williams below).
- Members without email are denoted by an icon of an envelope with a red diagonal line through it (see Jen Brown below).
- You will not be able to see the address or phone numbers of any member that has chosen to hide their details from Group Leaders (see Bazza Wilson below), although you will still be able to send emails to them.

Group Record for Architecture				
Details		Schedule	Members	Ledger
Group Members				
Select	Name	Address	Telephone	Mobile
<input type="checkbox"/>	Albert Anderson	10 Einstein Close, Demoton, DM26 7ZZ		
<input type="checkbox"/>	Jen Brown	5 Green Lane, Lower Wick, Demoton, DM4 5GL	01 001 428 679	
<input type="checkbox"/>	Susan Bunting	141 High Street, Demoton, DM12 7RB	0123 888 4444	
<input type="checkbox"/>	Sandi Williams	245 Noplace Lane, Demoton, DM18 2BQ	0123 357 1598	07070 63976
<input type="checkbox"/>	Bazza Wilson	hidden	hidden	hidden
<input type="checkbox"/>	Carol Wiltshire	20 Somerset Street, The Old Farmhouse, Demoton, DM10 1AA		

- If your U3A has switched on the global setting to hide the addresses of all members from Group Leaders, the 'Address' column will not be displayed (see below).

Group Record for Architecture				
Details		Schedule		Members
Group Members				
Select	Name	Telephone	Mobile	Status
<input type="checkbox"/>	Albert Anderson			Current
<input checked="" type="checkbox"/>	Jen Brown	01 001 428 679		Current
<input type="checkbox"/>	Susan Bunting	0123 888 4444		Current
<input checked="" type="checkbox"/>	Sandi Williams	0123 357 1598	07070 639768	Current
<input type="checkbox"/>	Bazza Wilson	hidden	hidden	Current
<input checked="" type="checkbox"/>	Carol Wiltshire			Current

c) Adding and Removing Members

Click the blue links on the right of the page to:

- Remove a member from the Group [A]
- Make a member a Group Leader [B] – note: you may have more than 1 leader
- Remove a member from the Leader role [C]

Status	Role	Actions
Current	Leader	remove - cancel leader
Current	Leader	remove - cancel leader
Lapsed		remove - make leader
Current		remove - make leader
Current		remove - make leader

Diagram illustrating actions on the table:

- Red box around 'remove' in the first row, with arrow labeled **A**.
- Red box around 'cancel leader' in the second row, with arrow labeled **C**.
- Red box around 'make leader' in the third row, with arrow labeled **B**.

Members can be **added** to the Group from this page in 2 ways:

- Select their name from the **Add member by name** drop-down list below the table, or
- Enter their membership number (if known) in the **Add member by membership number** box. Members may be added in batches by entering their membership numbers separated by commas.

Add member by name

Add

Add member by membership number

Separate numbers by commas

Note that you can keep adding members beyond your Group Max setting and they will automatically be added to your waiting list.

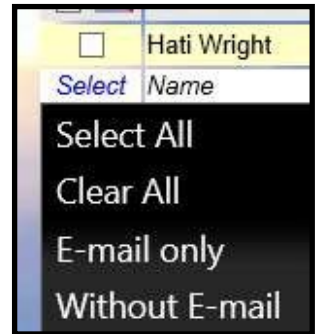
When adding members by membership number, you will be prompted to confirm that the name(s) of these members are accurate by pressing the **Add selected members** button.

Select	No	Name
<input checked="" type="checkbox"/>	1050	Jen Brown
<input checked="" type="checkbox"/>	1051	Joe Brown
<input checked="" type="checkbox"/>	1053	Ron Brown
Select	No	Name
<input type="button" value="Add selected members"/>		
3 members (3 selected)		

d) Selecting Members from the Members List

To select one or more members prior to performing one of the operations described below, tick the required box(es) in the left-hand column next to each member's name. Or click **Select** at the top or bottom of the column, followed by any of the choices from the drop-down list that appears:

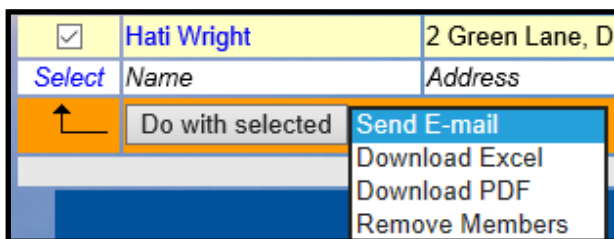
- **Select All** for all displayed members
- **Email only** for members with email addresses
- **Without email** for members without email addresses



e) Operations with selected Members

After selecting one or more members as described above, the following operations are available by choosing from the drop-down list below the table and pressing the **Do with selected** button:

- **Send email:** opens a form on which to compose an email
- **Download Excel:** generates an Excel file containing members' contact details
- **Download PDF:** generates a pdf document containing members' contact details and photo (if available)
- **Remove members:** removes members from the Group



For Excel and pdf downloads you will be asked to tick the fields to include, before pressing the **Download** button:

Select the fields to be included
in addition to a member's name

E-mail

Telephone

Mobile

Address

Emergency contact