

Watford Park



THE UNIVERSITY OF THE THIRD AGE



MEMBERSHIP MANAGEMENT SYSTEM

Guide for Event Organisers

INTRODUCTION

This Guide is written for the benefit of organisers of Events (trips) within Watford Park U3A (WPU3A), and should be read in conjunction with the equivalent Guides for Members and Study Group Leaders (SGLs). It only covers additional functionality that is relevant to the role of an Event (trip) organiser. It is assumed in this guide that the reader has read and is familiar with the content of the Guides for Members and SGLs.

This guide is not intended to be fully comprehensive but endeavours to explain the basic use of the system, and to capture the key lessons of users. As such it is a 'live' document that will be updated periodically. The latest version will be available online via the WPU3A website.

If you believe there are any errors or omissions in this document, please contact the System Administrator by email (see below for details), detailing the issue as accurately as possible.

Events with the Simple Membership (SM) System

Within the SM system Events are trips, outings, etc that are organized as one-off items, outside of the normal study group meeting programme. They may be organized as part of a 'normal' study group, or as separate items. Note however that the functionality for the former is not yet fully developed and operational, and therefore this guide is focused solely on setting up and operating Events outside of 'normal' Study Groups (ie those open to all members, such as Theatre Group, Outings Group, and Garden Group trips).

Whilst ultimately we may want to use SM to provide 'full management' of events, but at this stage we are restricting the functionality to enable members to express interest in attending an event, and to allow event organisers to manage attendees and those on the waiting list.

SM recognizes two roles in the setting up and management of Events, those of Event Organiser (EO) and Event Coordinator (EC). The role of EO in SM is equivalent to a Study Group Leader, whereas the role of EC is the equivalent of the Study Group Coordinator. The main difference between the two roles is that an EC can set up all the details of an Event within the system, whereas an EO can only manage the membership and other logistics. Within WPU3A, as we only have a small number of EOs, we have decided that EOs will be ECs too, and in that way will have full ability to both set up and manage their Events. This Guide therefore covers both roles within the system and uses the term Event Organiser (EO) to refer to both roles within WPU3A.

Please note that an EC has access to all the Event Settings within the system. Any changes to these settings affect ALL Events, not just those of a specific one. Event Organisers are therefore asked not to make any changes to any settings or other configurable items within the system without prior reference to the System Administrator.

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CONTROL PANEL

EOs have access to the same areas of the system as members, as shown in Figure 1 below. However EOs also have access to some additional functionality that enables them to set up and manage the Events that they organise, and to undertake various other group administrative functions within the system.

Note that in order to allow EOs to have the ability to set up their own Events they have been given full Event Coordinator permissions within the system, giving access to the Event Admin area and settings within it. Please do not make any changes in this area without first discussing them with the System Administrator.

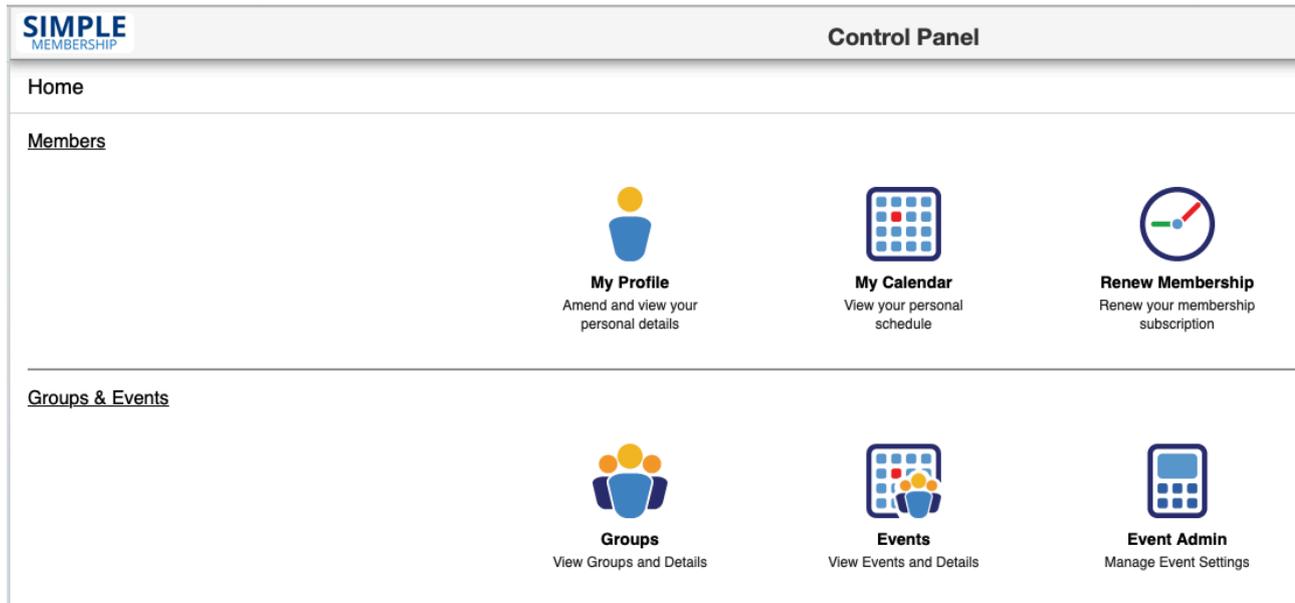


Figure 1 - Control Panel

This guide only describes the various areas of the Control Panel where there are differences for EOs from Members and SGLs.

The Members section of the Control Panel is the same for EOs and Members and is therefore not covered here. Please refer to the Guide for Members for an explanation of this area.

The Groups icon is covered in the Guides for Members and Study Group Leaders and is therefore also not covered here. Please refer to those Guides as appropriate for an explanation of this area.

Please note that the facility to create Events from within Groups is not currently enabled within the system and cannot be used. Events can only be created and managed through the Events icon, as described below.

EVENTS icon

To set up a new event or access information on any event, click on the “Events” icon and a list of current Events will appear.

Creating a New Event

In the top right hand corner of the Events Page is a link to ‘Add a new Event’:

[Add a new Event](#) 

Click on this link to open up the ‘Add a new Event’ page and then complete the various fields, as follows:

Name – the name that you wish your event to be known by. You may wish to preface this with your group name e.g. “Garden Group Visit - RHS Wisley Event”.

Category – select this from the drop-down menu. These categories have been set up to reflect the various Groups within WPU3A who organize events. (Note that these categories will only have relevance when we enable the website capabilities of the system, and Events appear there). Please do not use the Test Group category.

External Url – if you wish, type (or paste) here a link to any relevant website for the event.

Date – click on the calendar icon to select the date on which the event will occur.

Time – click on the clock icon to select the time at which the event will start. If the event involves (eg) coach travel you may want to put here the time the coach will leave, or the time you want members to meet.

Duration – enter the anticipated duration of the event in hours

Venue – select the venue for the event from the drop-down menu, or select ‘other’ and complete the details in the ‘Other Venue’ field. If the event involves (eg) coach travel you may want to select the venue from which the coach will leave, or where people need to assemble.

Other Venue – only enter information in this field if you have selected ‘Other’ in the Venue field.

Maximum Attendees – enter here the maximum number of people who will be able to attend the event.

Waiting List Size – enter here the maximum number of people who will be able to be on the waiting list for the event, once the maximum number of attendees has been reached.

Content – Enter here any description, other information, or requirements for the event that members and attendees need to be aware of. This is a free text area, and there are a number of icons that will allow you to format and edit the text, in line with normal word-processing software. Hovering your mouse over each icon will bring up a text box with a basic description of what it is.

You are able to edit all of these details in the future if required, say, for example, when the event is full. See the Edit Event section of this Guide.

Once you have included all the details required, click the circle with the green plus sign (+) at the top or bottom right hand corners of the page. This will save your data and exit the page. You will get “required” messages against some fields if there is no information provided, and you will need to complete these fields before being able to save your data and exit the page.

If you wish to exit the page without saving your data, click the circle with the red X at the top or bottom right hand corners of the page.

Clicking the green cross will take you to the page for the event you have just created. Clicking the red X will return you to the list of events.

Once you have created an event you will need to allocate one or more Event Organisers. This is done via the Manage Event Attendees icon in the top right hand corner of the Event Page, and is described in the section below for this icon.

Viewing and Editing Events

To examine any event click on the name of the event in the left-hand column of the table listing all current events. This will open up the page for that event, and you will see a header with the Event Name and up to seven icons in the top right-hand corner of the page. On the left hand side is a green arrow which will take you back to the List of Events.

Note that you may not see all of these icons against every event. Which icons are shown depends on (eg) whether an EO has been allocated, there are attendees registered within the system, and whether you are the EO.



Hovering your mouse over each of the icons will bring up a text box that describes what it is. They are, from left to right:

- Email Event Organisers
- Apply to Join Event (note, this text box is currently missing!)
- Email Event Attendees
- Event (Attendee) Details (note, this text box is currently missing!)
- Manage Event Attendees
- Edit Event
- Delete Event

Email Event Organisers icon

This icon allows a member to send an email to the organizer(s) of an event and is covered in the Guide for Members.

Apply to Join Event icon

This icon opens up a page which allows a member to apply to attend the event and is covered in the Guide for Members.

Email Event Attendees icon

This icon operates in a similar way to the Email Group Members icon described in the Guide for SGLs. This describes the differences from “normal” email systems, the implications of which you need to understand and are not repeated here.

Whilst EOs have the ability via this icon to email attendees of ANY event, you should only do so for those events for which you are the EO.

Event Details icon

Clicking on this icon brings up a window which lists all the attendees of the event who are registered in the system, including their contact phone number and emergency contact details (if these have been registered in the system). Having set up details of attendees of your event under “Manage Group Members”, you may wish to check here that the details are as expected.

In the top right of this window are five icons:



The “Print Content” icon will bring up a printing window on your device, allowing you to format and print this list as you would normally on your device.

To the right of the Print Content icon is an ‘X’. Clicking this closes the window.

Below these two are three other icons:

The left hand icon  is Create Event Register. This allows you to download, and save to your device, a blank event register as a .pdf file. You will then need to print this off and add in any further details required manually.

The middle icon  is Create Event Register Excel. This allows you to download, and save to your device, a blank event register as an Excel file. You can then edit and manipulate this as required within Excel. You may wish to use this to help you manage the overall logistics of the event.

The right hand icon  is Create Event Register 2. This allows you to download, and save to your device, a .pdf version of the event register with members' phone numbers and blank fields which will allow you to keep track of payments.

Manage Event Attendees icon

Clicking on the icon brings up a window which allows you to allocate one or more organisers of the event, manage the attendees of the event, maintain a waiting list, and to put the waiting list in priority order. **It is important to allocate at least one Event Organiser to any event as soon as the event has been created** (please see below).

There are three sections in the window – Available Members, Members, and Waiting List (as shown below).

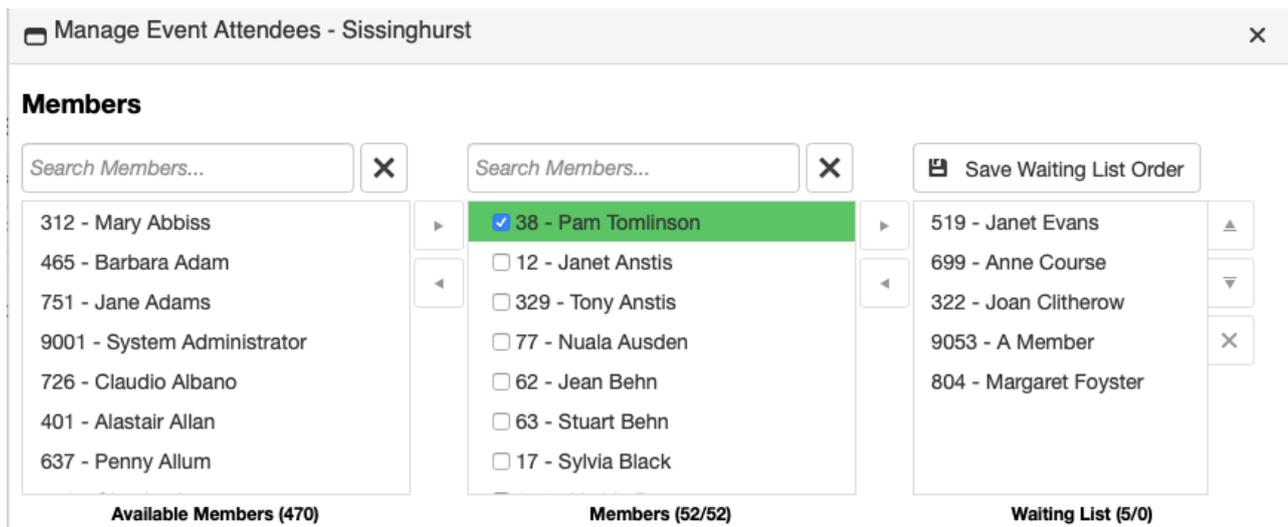


Figure 2 - Example of Manage Event Attendees

At the bottom of the window is a blue box that explains how to add members to the Event or waiting list. It works in a similar way to adding members to a Study Group (as described in the Guide for SGLs) and is not explained further here.



Add the event attendees from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Event Organisers. If the event capacity has been reached members will be added to the waiting list in the right column. They can be added to the event as soon as the number of members in the middle column is less than the event capacity.

Allocating an Event Organiser

From the list of Available Members select the name of the person(s) you wish to make the Event Organiser. The name will be highlighted in blue. Then click the arrow (>) between this section and the Members section to move the name(s) into the Members section, and once there click on the box to the left of the name(s). This will put a tick in the box and highlight the name(s) in green, indicating that that they are the Event Organiser(s).

Note: If you have two (or more) people identified as EOs then when a member contacts the event to attend, all EOs will receive an email notifying them. If there is only a single EO they must have a valid email address within the system.

Below the blue box is a table listing all members currently attending the event, along with the meals they have requested and the guests they are bringing. (To see this you will need to use the scroll bar at the right hand side). The 'meals' and 'guests' facility is not currently enabled so these columns are not relevant to WPU3A at present.

Clicking the pen icon against each member's name allows you to edit the details for them in the table. Click either 'update' (to save the data and exit), or 'cancel' (to exit without saving).

Once you have completed all the changes you wish to make click the "X" in the top right corner of the window. This will close the window and save the changes.

Members may contact you through the system, applying to attend your event. If so, you will receive an email informing you (see example below). As requested, please reply to the message advising the member whether you have added them to the event or waiting list, and/or with any other instructions they need to be aware of, eg regarding payment. (In the case of a member added to the waiting list, you may wish to retain a copy of your reply so you can contact them again when a vacancy arises)

To the Organiser of Event (Second Test Outing):

Bertram Wooster (Membership Number: 9055) has requested to attend your event (or to join the waiting list if the event is currently full).

Please contact Bertram using the email address:

system.wpu3a@gmail.com

or phone number: 01234 567890

Edit Event icon

Clicking on this icon brings up a page which allows you to edit the details of the event that were entered when the event was created. Refer to the "Creating a New Event" section of this Guide for information regarding each of the fields on this page.

Note that in the bottom right of each Event page is an "Edit" box. Clicking on this brings up further boxes, the functionality of which is currently not clear, and clicking on these results in an error message. Please therefore ignore this Edit box.

Delete Event icon

Clicking on this icon brings up an icon which allows you to delete the event, and all of the details about it held within the system. Should you need to delete an event, you should first remove any event attendees (and, of course, contact them to advise them of cancellation) before clicking on this icon.

Please note that Event Coordinators have the ability to delete ANY event, not just the one(s) for which they are Event Organiser. Please therefore be very careful in the use of this delete facility. There is no ability within the system to recover details that have been deleted in error!

EVENT ADMIN icon

This icon is only relevant to the EC role and not that of an EO. **Please do not make any changes to the pages behind this icon without reference to the System Administrator.**

Clicking on the Event Admin icon reveals two pages:

- Event Categories
- Settings

Event Categories

EOs should not make any changes or additions to any of the Event Categories without reference to the System Administrator, since changes will affect ALL Events within WPU3A.

Settings

EOs should not make any changes to any of the Event settings without reference to the System Administrator, since changes will affect ALL Events within WPU3A.

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Version Control

V1.0

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