SIMPLE
MEMBERSHIP

MEMBERSHIP MANAGEMENT SYSTEM

Guide for Members

	Simple Membership
Watford Park U3A THE UNIVERSITY OF THE THIRD AGE	Guide for Members

INTRODUCTION

This Guide is written for the benefit of Members of Watford Park U3A (WPU3A). It 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.

Aims and Objectives

Simple Membership (SM) is a membership management system that seeks to bring together in one place all the information we hold on members. By doing so, it aims to:

a. reduce the effort required, particularly by the Membership Secretary, Study Group Coordinator (SGC) and Study Group Leaders (SGLs), in managing membership details
b. provide additional useful features for Members and SGLs. (Note: features will be introduced progressively and not all are available now. It is hoped that future versions of SM will include, for example, the ability to make online payments and replace the existing website.)
c. meet the requirements of the General Data Protection Regulations (GDPR).

Use of SM is not mandatory by members. If you do not have access to the Internet or are not comfortable with using it then you can ignore it and continue as you do today. It does though provide members with the following features (details of which are described later in this Guide):

a. view & amend your personal details
b. view details of the Study Groups to which you belong
c. view a monthly Calendar of Meetings of your Study Groups and Events you have signed up for
d. view a list of all WPU3A Study Groups and details of them including vacancies
e. send an email to the SGL(s) of any Study Group
f. apply to join any Study Group
g. renew you membership – *** **not currently available** ***
h. view details of forthcoming Events, email Event organisers and sign up for those you wish to attend (but note that this facility is not yet fully operational)
i. view details of Events you have signed up for (but note that this facility is not yet fully operational)

The design of the system aims to achieve an appropriate balance between provision of useful features and the need to maintain the security of member details.

Overview

This guide is organised primarily to provide guidance to Members in the use of the system. The starting point is the Control Panel ('Home Page'), which is the page that appears following login to the system and is shown at Figure 4.

On some of the pages behind this there are a number of 'icon links' in the top right corner of the pages. Hovering your mouse over each icon will bring up a text box that explains their purpose. Clicking the icon will take you to another page relevant to that functionality.

Please note
1. not all users will be able to access all parts of the system, since permissions are set to preserve data protection and privacy and only to allow individual users to access areas that are relevant to them. If you believe that you need access to areas of the system that you are unable to see or edit please contact the System Administrator.
2. this guide is written on the basis that users will be accessing the system via a desktop or laptop computer. The system is also accessible from mobile devices, but some of the guidance here (e.g. around the use of a mouse) may require modifying to enable successful operation. Web pages may also not display properly in all cases on smaller devices such as phones and small tablets.

Key Contacts

Throughout this document there are suggestions to contact various individuals if you require further specific assistance. Please use the details below to contact these individuals:

System Administrator – system.wpu3a@gmail.com

Membership Secretary – membership.wpu3a@gmail.com

Study Group Coordinator – study.wpu3a@gmail.com

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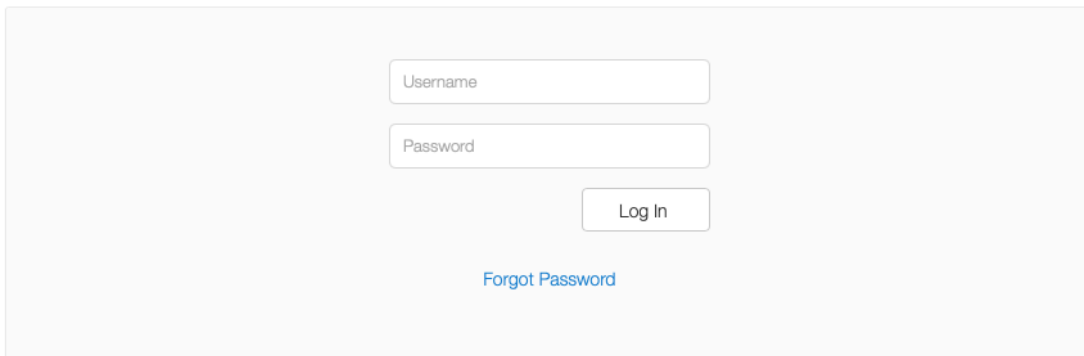|	**Simple Membership**
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GETTING STARTED

When you are first given access to the system you will be sent an email with your user name and a request to change your password. If there is a link in the email then click this, which will take you to the system log-in page. Otherwise type https://u3a.simplemembership.co.uk/Watfordpark into your browser, where you will then see the Login Screen (Figure 1):

Watford Park U3A

Member Login
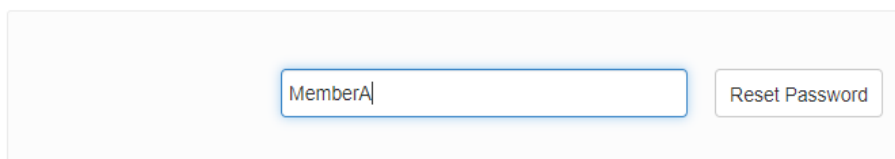
Username
Password

Log In

Forgot Password

Now click "Forgot Password".

This will bring up a second page where you should enter your Username and click "Reset Password".

Password Reset
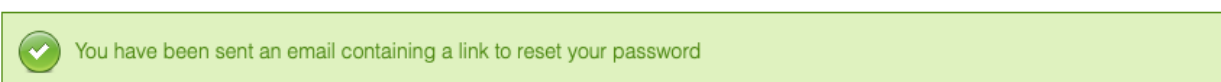
| MemberA | Reset Password |

You will then see:

Password Reset

✓ You have been sent an email containing a link to reset your password

This email (Figure 2) may take a few minutes to come through.

Figure 2 - Password Reset Email

Within the email click on the link ("Click here to reset your password").

This will take you to the Password Reset page (Figure 3) where you will need to enter your new password twice before clicking "Store New Password".

Figure 3 - Password Reset Page

Please note the requirements here for password length and specific characters required within it. You cannot change your Username as this is system-generated, so please ensure that you remember both your Username and Password.

You will then see:

If you have any problems completing this initial log-in please contact the System Administrator.

Once you have completed the entries for your password, you can log in using it and your Username.

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LOGGING IN

In your browser type https://u3a.simplemembership.co.uk/Watfordpark, which will take you to the system log-in screen as above. You may find it useful to save this page into your Favourites on your web browser.

Enter your Username and Password as above and click "Log In". This will take you to the Control Panel page within the system (see Figure 4).

If you forget your password click the link "Forgot Password" on the log-in page (Figure 1), then enter your Username on the page that comes up and click "Reset Password". This will send an email to the email address held for you within the system. Follow the instructions on that email to reset your password (as above – Getting Started), and then log in with your new password.

If you forget your Username, please contact the Membership Secretary.

LOGGING OUT

Click on the Logout button in the top right of any of the screens within the system. You do not need to return to the Home page (Control Panel) to log out.
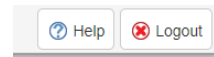
Note:
1. you will be logged out automatically after 30 minutes of inactivity - a warning chime will alert you to this 2 mins. before you are logged out along with a pop-up message allowing you to continue.
2. it is good practice, for security reasons, to log out before leaving your device unattended for any significant period.

HELP

The Help facility within the system is only sparsely populated at present so please refer to this User Guide.

CONTROL PANEL

The Control Panel is the Home Page for the system, and enables you to navigate to all parts of the system.
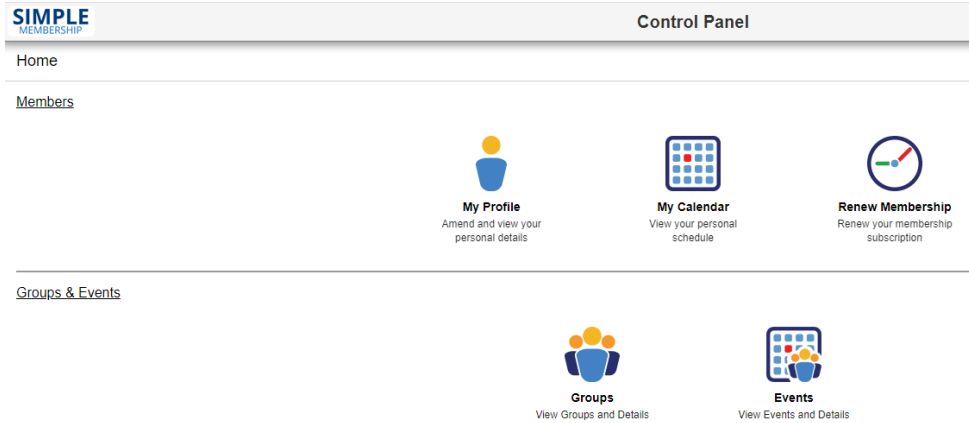
Figure 4: Control Panel

To return to the Control Panel from any other page in the system click 'Home' in the top left corner of the page.

On some pages, you can either use the 'back' button on your browser, or right-click you mouse and select 'back' from the menu that appears, to return to your previous screen. Some pages also have a green 'back' arrow in the top left corner, but this may return you to the Control Panel or another part of the system in some cases, rather than to your previous page.

Please note that you will only be able to see on your screen, and access, the sections of the Control Panel and other areas of the system that are enabled for your access permissions.

MEMBER FUNCTIONS

As a member you are able to access two parts of the system from the Control Panel:

1. An area entitled "Members' which has three icons that allow individual WPU3A members to view and manage their membership details:
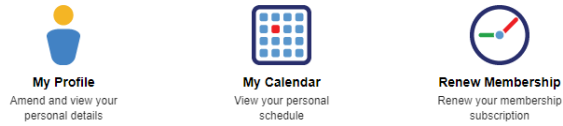
Members

Figure 5 - Members area

2. An area entitled "Groups & Events", which has a two icons that allow you to access details of each Study Group within WPU3A and planned Events.
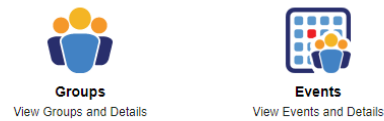
Groups & Events

Figure 6 - Groups and Events area

Clicking on each of these icons will reveal the detail behind them as described below.

MY PROFILE icon

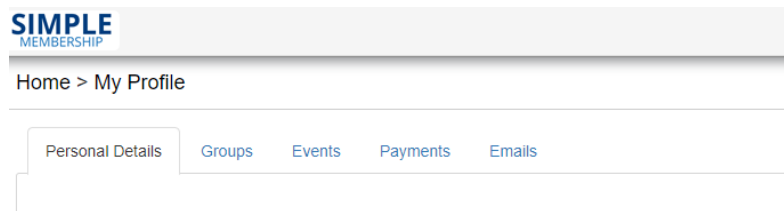This displays a page with five tabs along the top of it:

Figure 7: My Profile

Clicking on each tab brings up that relevant page.

Personal Details tab

Figure 8 – Example of a Personal Details page

Most of the fields on this page can be amended by you if required, however some fields will have been 'locked' and you will not be able to change these directly. Please ensure that your details are correct, and fill any gaps as relevant. If you wish to make changes to any of the fields that have been locked, please contact the Membership Secretary.

NOTE: if the 'Partner' field is blank, and you wish to add your partner's name there, the system will allow you to do this, and will tell you it has saved it. The membership Secretary will then need to create the link between you and your partner within the system. Once this has been done your partner's membership number will appear in the top of the two partner fields, and their name will appear in the field below.

To make any amendments click on the relevant field, make the changes required, and then click on 'Save Changes' in the top/bottom right of the page. If you make a mistake either simply overwrite it with the correct data, or click the 'Cancel' box in the top/bottom right of the page. Your changes will only be saved once you have clicked 'Save Changes'.

If you make an entry (e.g. phone number) which doesn't satisfy the 'rules' set within the system you will see a red asterisk next to the relevant box, and the system will not allow you to save the change. Please amend the entry and try again.

If you wish to please enter the key details of your occupation(s) prior to retirement. As a self-help group it is useful within the WPU3A to be able to know if there are skills and experience that we might be able to draw upon.

If you are willing to help with the running of WPU3A in any way – big or small – please click 'Yes' against 'Are you willing to volunteer', and add any details of help you are willing to provide into the text box below. There are a number of ways you may be able to help, from sharing your skills and knowledge in a Study Group (not necessarily as a leader), to helping with the set-up and running of our monthly meetings (setting out chairs, helping with teas etc), to being a part of the committee that runs our U3A. If you willing to help and would like to discuss the opportunities in more detail, please contact the Study Group Coordinator in the first instance.

Once you have saved the changes successfully you will see a green banner message at the bottom of the screen confirming this.

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Groups tab

This page shows which study groups you are a member of or on the Waiting List for, and whether you are the leader of any of them.

Figure 9 - Example of Groups tab

Clicking on the name of any group will take you to a page that gives key details of that group.

In the top right corner of each group's page is an icon that will allow you to email the group leader(s). (SGLs have additional icons, details of which can be found in the Guide for SGLs).

To exit a group page use the 'back arrow' in your browser, or right click your mouse in a blank area of the screen and then select "Back" on the menu that appears. This will take you back to the Groups tab in your Profile. If you click the green 'back arrow' in the top left of the screen this should take you to the Group Details tab within the Groups icon (see below). If the page is blank, clicking on one of the other tabs then back to Group Details will reveal the missing information. (Until this is rectified you are advised not to use the green arrow).

Note: Only SGLs or the SGC can create or modify study group memberships. If you are not shown as a member of any group to which you belong or have any concerns regarding the details shown for a group, please contact the SGL in the first instance.

You will see that there is a Group called WPU3A Monthly Meeting, to which you should belong. As the name implies, this is the monthly meeting for all U3A members, held at St Luke's Church Hall. As we develop the system we will be using the pages associated with this Group to communicate details of the monthly meetings with members.

Events tab

This page shows any Events (ie trips) you are signed up for, or on the waiting list for, and whether you are the Event Organiser. Clicking on an Event name will show you details of the event. You will are also able to apply to join the Event or email the Event Organiser from the Event page.

Please note though that this part of the system is not fully populated yet, and therefore it is likely that not all Events (trips) which are available, and to which you are signed up, will be shown. You should therefore rely on information in the Monthly Newsletter for what is available, and on communications from the relevant trip organizer to confirm your attendance.

Payments tab

*** This part of the system is not currently enabled for WPU3A ***

When enabled this will show your record of membership payments. It will only show data from the 2018/19 membership year onwards, and cannot be edited by members.

If you have any concerns regarding the details on this page please contact the Membership Secretary in the first instance.

Note: This screen will show whether or not you have signed up for Gift Aid on your subscription. If your tax status has changed please ensure that you change this on your next renewal application.

Emails tab

This page shows recent emails that you have sent or received through the system. You cannot however view the content of them.

MY CALENDAR icon

Clicking on this icon brings up a monthly calendar showing meeting details for Study Groups to which you belong and events you have signed up for (including any for which you are on the Waiting List). Study Group meetings are shown in a blue font and Events in red. Clicking on each meeting or event will take you to a page giving the further details provided by the SGL or Event Organiser.

16-Jul

Test Group 3 9:00 AM

Sissinghurst 1/1/0001 8:30:00 AM
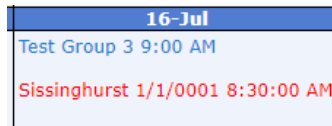
Note: If you have not been included as a member of a study group within the system, then these meeting details will not show here. Please contact the SGL if you believe there are errors in this respect.

Note: The Events part of the system is not fully populated yet, and therefore it is likely that not all Events (trips) to which you are signed up will be shown. You should therefore rely on communications from the relevant trip organizer to confirm your attendance, and the details on each Event.

(Please also note that there is currently an error in the way the date for Events appear in your calendar (as above "1/1/0001"). This is being resolved with the developer.)

RENEW MEMBERSHIP icon

This area shows you when your membership is due for renewal.

When your membership is due for renewal you will be sent an email reminder with information about how to renew, and the messages in this area will be updated accordingly.

GROUPS icon

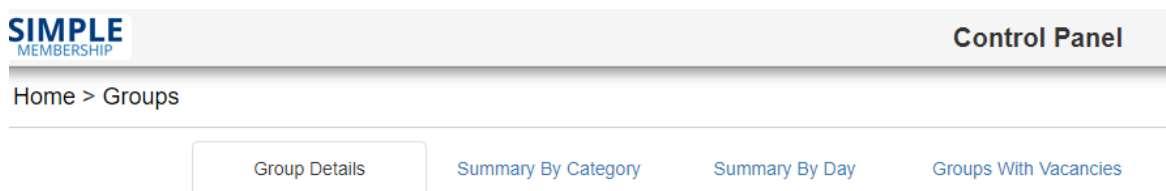Clicking on this icon brings up a page with four tabs along the top of it, as shown below in Figure 10:

SIMPLE MEMBERSHIP   **Control Panel**

Home > Groups

| Group Details | Summary By Category | Summary By Day | Groups With Vacancies |

Figure 10 - Groups page

Clicking on each tab brings up that relevant page.

Group Details tab

This page is a summary of every study group within WPU3A, showing the name of each group, the week(s) in the month that it meets, the day(s) of the week that it meets, and whether meetings are held in the morning or afternoon.

Summary By Category tab

As well as study groups that are solely for WPU3A members, we also have joint groups with other local U3As. These are identified separately on this page. Also listed separately are groups running events (trips) and groups open to all members.

Summary By Day tab

This page allows you to see when each group meets, by day, morning and afternoon.

Groups With Vacancies tab

This page lists all study groups with vacancies. The information is dependent on updates from SGLs.

Within each of the above four pages, clicking on any of the group names will take you to a page giving further details of group meetings, whether there are vacancies, and of the Group's Leader(s).

Note: Vacancy details in particular are dependent on SGLs having populated the system with the details of the membership of their group(s), and therefore these details may not be fully correct – especially immediately following the initial release of the system

There are two icons in the top right of the screen that allow you to send an email to the Leader(s) or apply to join the group. (If you are already a member of the group or on the waiting list the second icon will not be shown).

Underneath is a link to the WPU3A website for the group.

Use the green 'back arrow' in the top left of these screens to return to the previous screen.
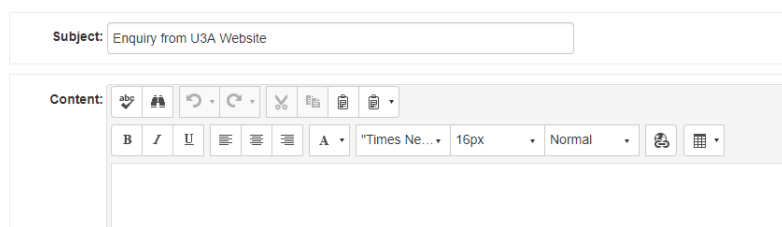
EVENTS icon

Note: The Events part of the system is not fully populated yet, and therefore it is likely that not all Events (trips) to which you are signed up will be shown. You should therefore rely on information in the Monthly Newsletter for what is available, and on communications from the relevant trip organizer to confirm your attendance.

Clicking on the icon will take you to a table listing all the events currently being organized that have been entered into the system, giving the Event Name, Date, Time, Duration and Location. Clicking on an Event Name or the ⓘ symbol at the right hand side will show you more details. (Note: if the Location field in the list of events is blank, clicking on the Event Name will show it).

There are two icons in the top right of the Event Details screen that allow you to send an email to the Event Organisers(s) or Apply to Join the Event. (If you are already a member of the event or on the waiting list the second icon will not be shown). If the event organiser has provided it, you may also see a link underneath the icons to a web page relevant to the event.

Email Event Organisers icon ✉

This icon allows you to send an email to the organizer(s) of an event as shown below:

Email Event Organisers

| Subject: | Enquiry from U3A Website |

Content:

Note: The email page opens with a standard subject ("Enquiry from U3A Website") which you should first edit as appropriate to the event you wish to refer to. Then enter your message in the Content box. 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. Then click on the "Send Email" box at the bottom right.

Apply to Join Event icon

This icon opens up a page which allows you to apply to attend the event.

Apply To Attend The Event

> ✅ Please click the button below if you would like to apply to attend this event. The event organiser will be notified of your request by email and will be in touch.

Apply To Attend This Event

Click on the "Apply to Attend This Event" box and an email regarding your request will be sent to the Event Organiser(s), who will respond to let you know whether your application has been successful. You will also receive an email confirming this.

Version Control

| V1.1 | 19 Aug 2019: Inclusion of Event details, and minor 'cosmetic' changes |
| V1.0 | 12 Jul 2019: First formal issue |