

Watford Park



THE UNIVERSITY OF THE THIRD AGE



MEMBERSHIP MANAGEMENT SYSTEM

Guide for Study Group Leaders

INTRODUCTION

This Guide is written for the benefit of Study Group Leaders (SGLs) within Watford Park U3A (WPU3A), and should be read in conjunction with the equivalent Guide for Members. The latter covers all the aspects of the Simple Membership system that an SGL will require to access as a member. This guide only covers additional functionality that is relevant to an SGL. SGLs for groups open to all members should also read the Guide for Event Organisers.

It is assumed in this guide that the reader has read and is familiar with the content of the Guide for Members.

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.

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 and Study Group Coordinator (SGC), in managing membership details
- b. provide features for SGLs and members that they will find useful. (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. Nor is it expected that it will supersede all existing systems used by SGLs in managing their groups. SGLs are however encouraged to use the system to maintain details of membership/vacancies etc. of their groups. Doing this will enable up-to-date study group information to be available to existing and prospective members and reduce the workload on the Study Group Co-ordinator and the Membership Secretary.

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

Overview

This guide is organised primarily to provide guidance to SGLs in the use of the system. The starting point is taken as the Control Panel ('Home Page'), which is the page that appears following login to the system.

On some of the pages behind this there are a number of 'icon links' in the top right corner of the pages within the system. 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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CONTROL PANEL

SGLs have access to the same areas of the system as members, as shown in Figure 1 below. However SGLs also have access to some additional functionality that enables them to manage the membership of the groups they lead, and to undertake various other group administrative functions within the system.

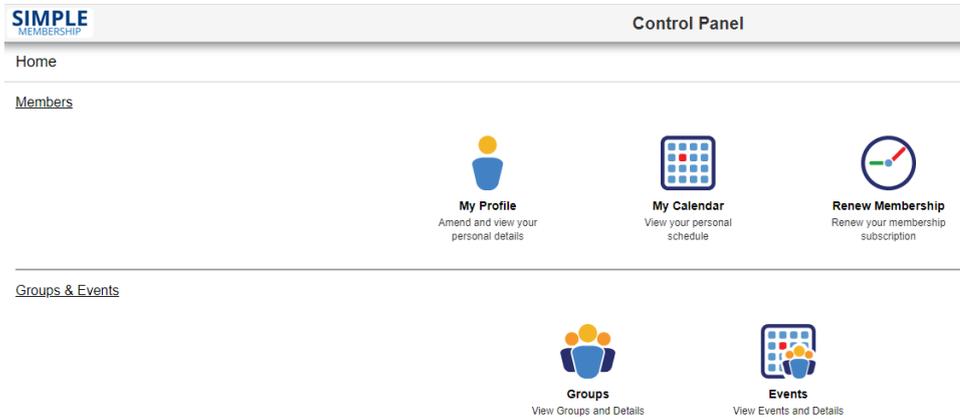


Figure 1 - Control Panel

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

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

SGLs are asked to ensure that group details within the Members area are up-to-date, by using the facilities described below.

STUDY GROUP LEADERS

To access information on any group, click on the “Groups” icon and a list of the available groups will appear, on the Group Details page.

To examine any group, find the group you are interested in and click on the name of the group in the left-hand column.

If you are not the leader of the group you will see just 2 icons in the top left-hand corner.

If this is a group you lead and the members have not been loaded into the group you will initially see three or four icons in the top right corner of the page. If members have already been added, you will see four icons as follows, with a link underneath to the group page on the WPU3A website.



[Group Web Page](#)

Hovering your mouse over each icon will bring up a text box that describes what it is. They are:

- Email Group Members
- View Group Details
- Manage Group Members
- Edit Group

It would be very much appreciated if SGLs would use the features of Manage Group Members and Edit Group to maintain information on the status of their groups. See text in **bold** under these sections below.

It is recommended that the SGL first goes into “Edit Group” to set the size of the group and the maximum size for the waiting list. This makes it easier to enter members and those on the waiting list, if there is one.

EDIT GROUP icon

Clicking on this icon brings up a page that contains the key information about the group. SGLs are currently not able to change most of these details. If you need to make changes to any of the areas that are ‘greyed out’ please contact the Study Group Coordinator.

Two areas you can (and should please) change are Max size and Waiting List size of your group. This information will determine how vacancy information is displayed on the Group’s page, and is important for anyone considering whether to apply to join.

In setting the maximum size of your waiting list please give some consideration to the likely turnover of members within the group, and at what point it would become feasible to start an additional group. Note that it is not the intention that you as SGL would necessarily run any additional group, merely that if there is sufficient interest on the subject the Study Group Coordinator (SGC) will look to find a leader and set up an additional group. If you require any guidance or assistance in the area please contact the SGC.

The bottom half of this page allows you to create a brief description of your group. This will appear on the group page within the system (that Members will see), and later on the WPU3A website. Further guidance on the latter will be provided in due course.

Once you have completed any changes you wish to make to this page, save them and exit the page by clicking the green ‘tick’ in the top right hand corner. If you wish to exit the page without saving your changes click the red ‘cross’ in the top right hand corner. Clicking the green arrow in the top left hand corner will also exit without saving the changes.

MANAGE GROUP MEMBERS icon

This section enables SGLs to manage group membership.

Clicking on the icon brings up a window which allows you to manage the membership of the group, to maintain a waiting list, and to put the waiting list in priority order. **SGLs are requested to set up this information as soon as possible and to maintain the information as the situation changes.** Doing so ensures that Members have accurate information about the Group available to them.

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

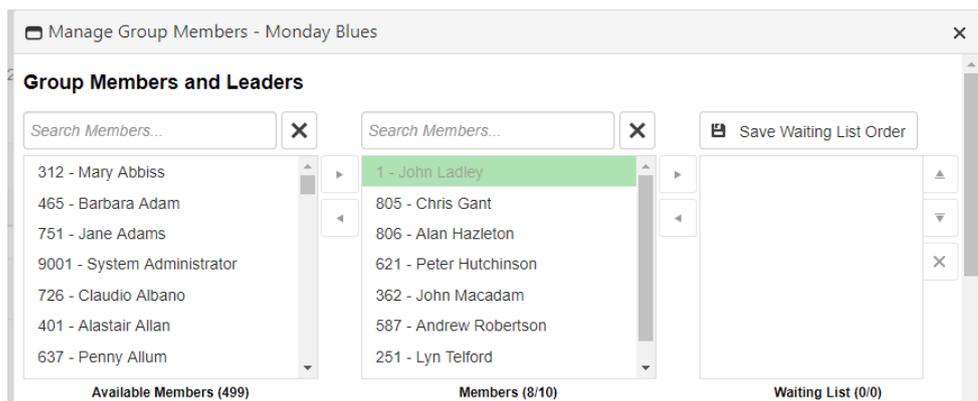


Figure 2 - Example of Manage Group Members

The lists of Available Members and Members can be searched by typing all or part of a member's details (name and/or membership number) into the Search box at the top of each section, or by scrolling through the lists. Clicking the 'X' to the right of the Search boxes clears the search.

Available Members – this lists all U3A members registered within the system, who are not currently members of the group, along with their WPU3A membership number. The list is arranged in alphabetical order by surname, and includes members of other local U3As who are members of approved joint study groups, where we have been made aware of them.

If the member you are searching for is not listed please contact the Membership Secretary, **BUT BEFORE DOING SO** please check with the individual concerned that they are either a member of WPU3A or another local U3A. Also note that many people are known by names which are not the names with which they registered with WPU3A.

If they are not a member of WPU3A they will not be able to join the study group without becoming a member.

If they are a member of another local U3A they will only be able to join the study group if it has been approved as a *Joint Study Group* by the Executive Committee. Please check under "Summary By Category" (under the Groups icon on the Control Panel) for approved joint study groups.

If you are running a Joint Study Group and wish to add in a new member from another U3A, please contact the Membership Secretary with the details of the new member (name, U3A name, and contact details (email as a minimum) and phone and address if you have them).

Members – this lists all U3A members who are currently members of the group. The SGL(s) are highlighted in green, but 'greyed out'. If there is a 'Group Buddy' within the group this name will be highlighted in turquoise, but also 'greyed out'. You cannot make any changes to the SGL and Group Buddy designations. If you need to make changes to these please contact the Study Group Coordinator.

Note: If you have two (or more) people identified as SGLs then when a member contacts the group to join, all SGLs will receive an email notifying them. If there is only a single SGL without an email address then you can nominate a Group Buddy who will receive these emails.

At the bottom of the window is a blue box that explains how to add members to the group or waiting list.



Add the group members 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 Group Leaders. If the group capacity has been reached members will be added to the waiting list in the right column. They can be added to the group as soon as the number of members in the middle column is less than the group capacity.

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In both cases this is accomplished by selecting and moving members from the Available Members section to the Members section. You can move individual members across or select multiple members at a time by holding down the CTRL or CMD key on your keyboard (depending on the device you are using).

Once you have selected the required members click the arrow between the Available Members and Members sections to move them into Members. If the group is full you will see a message similar to the following:

u3a.simplemembership.co.uk says

The Group cannot contain more than 11 members. All selected members were added to the waiting list

OK

Clicking on 'OK' will add the member to the waiting list.

Beneath the Members section you will see the total number of members currently in the group and the maximum membership set for the group [Members (current number/maximum number)]. Once the group capacity has been reached members will be added to the waiting list in the right column. They can only be added to the waiting list once the number of members in the middle column is equal to the group capacity.

Waiting List – this lists members waiting to join your group.

You can move members between the Waiting List and Members by highlighting the name(s) and using the arrows between these two sections, but only if the number of current members is less than the maximum membership number.

You can remove people from the waiting list by highlighting the name(s) and clicking the "X" to the right of this section. This will move those members back to the Available Members list.

You can prioritise the order of the waiting list by highlighting names and using the up and down arrows to the right of this list. Once you have done this click "Save Waiting List Order" above this section. The system default is to save the waiting list in alphabetical order by surname.

Beneath the Waiting List section you will see the total number of members currently on the waiting list and the maximum waiting list size set for the group [Waiting List (current number/maximum number)]. If you have reached the maximum size you set for the waiting list please contact the Study Group Coordinator, rather than just increase the size. It is possible that a new group could be formed from those on the waiting list.

Note: You can change the maximum size of the group and the maximum size of the waiting list on the Edit Group page – see above. If your group is full and/or has a waiting list, you should set the group capacity and maximum waiting list size before entering members into your group.

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 join your group. 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 group or waiting list. (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).

Subject: New Application To The Jazz Appreciation Group

A Member has applied to join your Jazz Appreciation group.

Please reply to this message advising the member what action you have taken in response to the application

VIEW GROUP DETAILS icon

Clicking on the icon brings up a window which lists all the members of the group 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 membership of your group under "Manage Group Members", you may wish to check here that the details are as expected.

In the top right of this window are 4 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 two other icons:

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

The right hand one is Create Group Register Excel. This allows you to download, and save to your device, a blank group register as an Excel file. You can then edit and manipulate this as required within Excel. You may wish to use this to keep a record of group meetings and attendance.

EMAIL GROUP MEMBERS icon

Background

Many SGLs will already have established means for communicating with group members. SM provides an alternative means of doing so. There are differences in the way this works from 'normal' email systems that you should be aware of so you can choose the approach that is the best for you. Some of the factors to be aware of are:

- SM maintains the list of member email addresses (so long as the Membership Secretary has been notified/updated) so you do not need to know/maintain them yourself.
- For privacy/security reasons, all SM emails are sent bcc. This means that recipients do not see who else has also received the message which, in turn, means that recipients cannot Reply All to the message.
- SM does not maintain a copy of an email's content. This means that you are advised to include yourself in the distribution list so you can see later what you said!

Using the SM email system

Clicking on the Email Group Members icon brings up a page which allows you to email some or all of the members of the group. However please note that as per the warning message on the page, members without an email address will obviously not be able to receive an email! You will need to find an alternative way to communicate with these members.

The default page is set up such that emails are sent from the first named SGL. You can override this by entering a different name and email address via the 'Override Sender Name' and Override Sender Email boxes. Enter here the name and email address that you want the email to be from, if not the SGL. Please be aware that any replies will also go to this sender/address.

In the "To:" section of the page select the member(s) you wish to email, from the Group Members box on the left. This shows all the members of the group who are registered in the system. If a member's name is showed 'greyed out' this means that they do not have an email address registered in the system.

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Click on one or more of the members' names to highlight them, and use the arrows in the middle to take them into the Selected Members box on the right. The single arrow allows you to do this one at a time. The double arrow allows you to add all members in a single click. You can highlight multiple members by holding down the CTRL or CMD key on your keyboard whilst you click your mouse on the names – whether you need to use the CTRL or the CMD key will depend on what computer operating system you are using.

If you want to remove one or more members from the email, use the same procedure and the 'back' arrows to remove them from the Selected Members box.

There will be a default title in the Subject field. Overwrite this to create a unique subject for the email, if required.

You can include one or more attachments to the email, by clicking "Select" in the "Attachments:" section. This will take you to the file system of the device you are on and allow you to choose the attachment(s) you wish to include. Once they are attached the filename(s) will appear above the "Select" box. Against each filename will be a 'remove' button which allows you to remove that attachment if you have made an error.

Note that you can only include an attachment of the file types listed.

The final section of this page is the email "Content:". Type into this box the text you wish to include within the email, as you would in your usual email application. There are some basic formatting options available for this, per the icons and drop-down menus at the top of this section. Hovering your mouse over each icon will bring up a text box that describes what it is. Click on each to select it as you would in any other similar application.

Highlighting text within the message and right-clicking your mouse will also bring up some of these formatting options.

Once you have completed your message, press "Send" in the bottom right hand corner of the page. You should then see a green banner telling you that the message has been sent successfully. You can then exit by clicking the green arrow in the top left of the page.

The "Emails" page in the "My Profile" area displays a list of recent messages you have sent. This shows only the Subject of the emails, not their contents. If you wish to be able to view and/or retrieve the content of emails sent make sure you include yourself in the list of recipients.



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Version Control

V1.1	19 Aug 2019: Events within Groups disabled, and other minor 'cosmetic' changes
V1.0	18 Jul 2019: First formal issue