

UMAS User Manual for Office Volunteers & Tutors

UMAS Version: 5.46

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Introduction

The UMAS membership management system is widely used by U3As in Victoria. For U3A office volunteers and tutors, UMAS provides a wide range of features including generating reports and emailing course participants.

This user manual is not exhaustive, but is intended to provide quick and easy instructions for the most common UMAS tasks.

The manual is divided into three sections: a general section on logging in and out, followed by sections for office volunteers and for course tutors. In most U3As, tutors only have access to UMAS features that are needed by tutors, whereas office volunteers have access to a wider range of features.

UMAS Access Levels

The features and functions available to you in UMAS depend on your access level. This document assumes that office volunteers have Level 3 access, and tutors have Level 4 access: These are the recommended access levels for these roles, however, it is ultimately a decision for each individual U3A. A U3A should ensure that each volunteer is trained appropriately to use the features available for their access level.

Logging In And Out

How to log in

1. In UMAS, go to the Login link in the left side menu:



Enter your membership number (or email address) and password, and click the Login button.

Membership number or email:

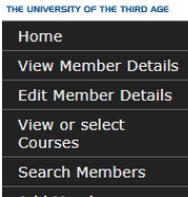
Password:

Note: Some U3As may provide separate login details for office volunteers: If so, when performing U3A office tasks you should log in using the office volunteer credentials rather than your personal membership credentials.

2. On successful login, you will see a welcome message, and some additional items will be available in the left side menu.



Example U3A



Welcome Office Volunteer (Member #1378)

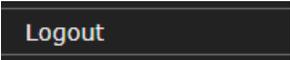
Members

To view and check Membership details click 'View Member Details'
To add or change Membership details click 'Edit Member Details'

Courses

How to log out

1. Click the Logout link in the left side menu:



For Office Volunteers

UMAS Access Levels

Different U3As give their office volunteers different levels of access. This guide assumes that you have level 3 (Reception) access. The features and menu items available to you in UMAS may vary if you have a different level of access.

Assist members in using UMAS

The companion guide, the *UMAS User Manual for U3A Members*, contains instructions for common tasks such as logging in and out, enrolling in courses, joining and renewing memberships. It also contains answers to common questions such as "I forgot my password, what do I do?".

You can give the guide directly to members, or use it to find answers to members' questions.

Find a member's details

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception), level 5 (Treasurer)

1. [Log in](#) to UMAS.
2. Click the Search Members link in the left side menu.



3. Enter a keyword and click Search.

The keyword can be any of: Membership number, First name, Surname, Email, Birth date, Addresses, or Phone number. Tick the Member number only or Surname only box if you only want to search by membership number or by surname.

Search Member

Search: Member number only?: Surname only?:

Your search will return any associated results that match the criteria entered. Fields searched include First name, Surname, Email, Birth date, Addresses and Phones, unless Member number only or Surname only checked.

5. A list of members matching the keyword will be displayed. Click either the View link (last column in the table) or the member number (first column) to view a member's record.

Member No.	First name	Surname	Address	Suburb	Subs date	
1003	Liz	Member	3 Test St	HEALESVILLE	31/12/2019	View
1004	Louis	Member	4 Test St	HEALESVILLE	31/12/2017	View
1001	Sally	Tutor	2 Test St	HEALESVILLE	31/12/2019	View
1002	Sam	Tutor	1 Test St	HEALESVILLE	31/12/2019	View

[Back To Top](#)

6. You'll now be on the Member Details screen. On this screen you can find the selected member's information, including:

- Membership number and membership type
- Personal and contact details
- Emergency contact
- Current enrolments and membership invoice status

Member Details

[Previous Record](#) [Next Record](#) [Previous Surname](#) [Next Surname](#)

Member number: **1003**
 First name: **Liz**
 Surname: **Member**
 Preferred name: **Lizzy**
 Gender: **Female**
 Year of Birth: **1955**
 Volunteer area:
 Member Type: **Single Member**

Street number and name: **3 Test St**
 Suburb: **HEALESVILLE**
View Via

Heads Up!

At this point, any actions done in UMAS are done *on behalf of* the selected member. For example, if you have "Liz Member" selected and you now edit member details or enrol in courses, you will be doing those things for Liz.

7. To return to your own login account, use the Login Member Return link in the left side menu:

Edit a member's details

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception)

1. First, select the required member in UMAS: See [Find a member's details](#) in this user manual.
2. Click the Edit Member Details link in the left side menu:

Edit Member Details

3. On the Edit Member Details screen, you can change details including:
 - o Address, phone and email
 - o Emergency contact person
 - o Password

Edit Member Details

Membership #	First Name	Surname	Gender
1377	<input type="text" value="Annie"/>	<input type="text" value="Jones"/>	<input type="text" value="Female"/>
Preferred name: <input type="text" value="Preferred name if applicable"/>			
Year of Birth: <input type="text" value="1960"/>			

Depending on your U3A's settings and your access level, there are some fields that you may not be able to edit: First Name, Surname, Gender, and Member Type. If one of these fields needs adjustment, you may need to ask an administrator (someone with Level 1 access) to do the editing for you.

4. After making your changes, click the Save button near the bottom of the screen.

Enrol a member in courses

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception), level 5 (Treasurer)

1. First, select the required member in UMAS: See [Find a member's details](#) in this user manual.
2. Click the View Or Select Courses link in the left side menu.

View or select Courses

A course list similar to this will be displayed:

Select Course for Annie Jones

1. Click on Courses to view additional details
2. Use tick box to select Courses (restrictions may apply)
3. To view a Parent code of Courses e.g. Art, Exercise etc. Use the **Parent code selection** drop down box
To return to the full list select **All** from the drop down box
4. Courses can be sorted by clicking on any of the column headings e.g. Course, Day etc.
5. Click on **Confirm Selection** button to enrol. You will be advised whether you are successful or wait-listed
6. Any Course can be removed (click on the **Remove** and then the **Go Back** button and you can return to the Course list to make another selection)
7. Maximum standard enrolments are X 20

Confirm Selections

SUBS2019 Subscriptions for 2019

Choose Parent code:

Code	Course	Location	Finished Leader	Full Start	New Day	1 day Time	Frequency
<input type="checkbox"/> ARMCH19	Armchair Travel	Golden Wattle	Sam Tutor	05/02/2019	Tue	13:00	Monthly1
<input type="checkbox"/> ARTCRA19	Art & Crafts Group	The Court House	Sally Tutor	05/02/2019	Tue	13:00	Weekly
<input type="checkbox"/> BANJO19	Banjo Club	The Court House	Sam Tutor	06/02/2019	Wed	13:00	Weekly
<input type="checkbox"/> BEER19	Beer and Cider Alliance	Private Home	Sally Tutor	08/02/2019	Fri	17:00	Monthly2
<input type="checkbox"/> BIKE19	Bike Riding	Outdoors variable	Sam Tutor	07/02/2019	Thu	9:30	Fort
<input type="checkbox"/> BUDDH19	Buddhism Discussion Group	The Court House	Sally Tutor	07/02/2019	Thu	9:00	WeeklyT1
<input type="checkbox"/> BUSH19	Bushwalking Group	Outdoors variable	Sam Tutor	01/02/2019	Fri	9:00	Monthly1

3. Tick the box next to each of the member's preferred courses. When you've selected all the required courses, click the Confirm Selections button.

Confirm Selections

SUBS2019 Subscriptions for 2019

Choose Parent code:

Code	Course	
<input checked="" type="checkbox"/> ARMCH19	Armchair Travel	
<input type="checkbox"/> ARTCRA19	Art & Crafts Group	
<input type="checkbox"/> BANJO19	Banjo Club	
<input checked="" type="checkbox"/> BEER19	Beer and Cider Alliance	
<input checked="" type="checkbox"/> BIKE19	Bike Riding	
<input type="checkbox"/> BUDDH19	Buddhism Discussion Group	
<input checked="" type="checkbox"/> BUSH19	Bushwalking Group	

4. On clicking the Confirm Selections button, you'll see a list of the selected courses, like the example below. If the member hasn't previously enrolled in any courses for this enrolment period, the list will include their membership subscription.

Selected Courses for Annie Jones

You will be automatically subscribed when you enrol. See below for details.

Code	Courses	Start date	Status	Amount
ARMCH19	Armchair Travel	05/02/2019		No charge Remove
BEER19	Beer and Cider Alliance	08/02/2019		No charge Remove
BIKE19	Bike Riding	07/02/2019		No charge Remove
BUSH19	Bushwalking Group	01/02/2019	Wait listed	No charge Remove
SUBS2019	Subscriptions for 2019	25/11/2018 - 31/12/2019		\$50.00

Finalise Courses, and if necessary, Invoice & Payment You must click this button to enrol

5. Check the list, and make adjustments if required.
 - o To remove a course, click on the Remove link on the right side of the course.
 - o To remove all the courses, click the Remove All Selections button.
 - o To add more courses, click the Go Back button to return to the main course timetable, where you can select more courses.
6. Click the Finalise courses, and if necessary, Invoice & Payment button.
Note: for some U3As, you may be required to agree to the U3A's terms and conditions (on behalf of the member)

before proceeding with this step.

7. You will be taken to the Member Details screen.

If the member hasn't already paid their membership fee for the current enrolment period, a message like "Your enrolment has been updated. Please click on the Invoice button to make a payment" will be displayed near the top of the screen.

8. Near the bottom of the screen, the member's enrolments will be displayed, as well as any waitlist enrolments: If necessary, use the **Print Enrolments** button to print out the enrolments for the member.

On a Wait list

Start Date	Time	Code	Description
01/02/2019	9:00	BUSH19	Bushwalking Group

Enrolments and subscriptions (Current)

[Print Enrolments](#)

Please select ▾

Start Date	Time	Code	Description	Amount		Paid
25/11/2018	0:00	SUBS2019	Subscriptions for 2019	\$50.00	Pay Invoice	No
05/02/2019	13:00	ARMCH19	Armchair Travel			
07/02/2019	9:30	BIKE19	Bike Riding			
08/02/2019	17:00	BEER19	Beer and Cider Alliance			

9. If necessary, you can print a copy of the member's invoice by clicking on the **Pay Invoice** (unpaid invoices) or **Invoice** (paid invoices) button, and then clicking the **Print** button on the pop-up invoice.

Need to make adjustments to a member's record that aren't listed here?

Depending on your access level, you may be able to perform more advanced tasks such as unenrolling a member from a course, or recording membership payments: See the Course Coordinator, Membership Manager, or Treasurer sections of the companion manual, *UMAS User Manual for U3A Office-Bearers*.

Absence Reporting

Detailed instructions are available in a separate document.

In brief, if your U3A has turned this feature on then members (and office volunteers on behalf of members) can report their upcoming absences. When available, absence management can be accessed through the **Report Absence** link in the left side menu.

Report Absence

Add a new member

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception), level 7 (Advanced Tutor)

1. Click the Add Member link in the left side menu.

Add Member

2. Fill in the form with the new member's details. Fields marked with an asterisk (*) are required.

Home	<p>Add New Member Details</p> <p>First Name*: <input type="text" value="First name"/></p> <p>Surname*: <input type="text" value="Surname"/></p> <p>Preferred name: <input type="text" value="Preferred name if applicable"/></p> <p>Gender*: <input type="text" value="Please select your gender"/></p> <p>Member Type*: <input type="text" value="Single Member"/></p> <hr/> <p>Year of Birth: <input type="text" value="yyyy"/></p> <p>Volunteer area: <input type="text"/></p> <hr/> <p>Street*: <input type="text" value="Street number and name"/></p>
View Member Details	
Edit Member Details	
View or select Courses	
Search Members	
Add Member	
Reports	
Send Emails	
Contact Us-Courses	

3. Click the Submit button at the bottom of the form: The new member will be added to the database.
4. If the new member provided an email address, they will receive an email containing their membership number. If not, you can print out their membership details, using the Print button on their membership record: See [Find a member's details](#) in this user manual.
5. If the new member's password is one you created (rather than one they nominated), either tell them the password or ask them to use the "I have forgotten my password" link on the UMAS login screen, in order to change it to a secure password of their choice.

Need to enrol the new member in a course?

See [Enrol a member in courses](#) in this user manual.

Course attendance list with dates: Print or email

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception).
Level 4 (Tutor) and level 7 (Advanced Tutor) can usually do this just for their own courses.

1. Click the Reports link in the left side menu.

Reports

2. On the reports screen, choose the Enrolments tab, and scroll down to Attendance section near the bottom.

1. Configure the report:

- Find the required course in the Choose a Course dropdown.
- Enter the required date range: Usually this would be the dates covered by the current semester, or term. (A full year is not recommended as it produces so many columns that it can be unreadable.)
- Choose a sort order: E.g. First Name, or Surname.
- To include class participants that are currently on the wait list, tick Include Wait Listed.
- To include extra blank rows on the list (i.e. in case of more enrolments), enter the number of extra rows in the Extra horizontal lines on list field.
- You can tick/untick Match up columns with dates to adjust the format of the report.
- To create a PDF report, tick Create a PDF.
- To email the list to the course leader, tick Email the Leader: On doing this, the Create a PDF checkbox will be auto-selected, so that the list will be emailed as a PDF attachment.

Choose a Course: ▾

Select Course Dates between: and: will appear on the list.

Include Wait Listed: Choose a sort order: ▾

Email the zTutor: Create a PDF: Extra horizontal lines on list:

Match up columns with dates:

Attendance list

2. Click the Attendance list button to generate (and email, if ticked) the list: The list will open in a pop-up window.

Attendance Class List

Course: **HISTORY19 History of Healesville**

Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**

Venue and zTutor: **The Court House - Sally Tutor**

Name	07/10	14/10	21/10	28/10	04/11	11/11	18/11
Lizzy Member							
Lou Member							

3. If required, click the Print button to print the list.

Course enrolment list: Print or email

Which access levels can do this?

Level 1 (Admin plus set up Courses), level 2 (Admin), level 3 (Reception).
Level 4 (Tutor) and level 7 (Advanced Tutor) can usually do this just for their own courses.

1. Click the Reports link in the left side menu.



2. On the reports screen, choose the Enrolments tab. The report you need is second from the top.

1. Configure the report:
 - o Find the required course in the Choose a Course dropdown.
 - o To include class participants that are currently on the wait list, tick **Include Wait Listed**.
 - o To include class participants' addresses, tick **Show Address**.
 - o To include emergency contact details, tick **Show Emergency contact**.
 - o To email the list to the course leader, tick **Email the Leader**.
 - o Choose a sort order for the list.

Lists the members within the selected Course. The reports have multiple options to display additional information

Choose a Course: **HISTORY19 : History of Healesville**

Include Wait Listed: Show Address: Show Emergency contact : Email the Leader:

Choose a sort order: **Status + Surname**

List Enrolments

2. Click the List Enrolments button to generate (and email, if ticked) the list.

Enrolment List Print

Course: **HISTORY19 History of Healesville**

Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**

Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile	Phone	Email
17/12/2018		1377	Annie Jones		() - - - -	info@barbendir
Emergency contact:	Fred Jones	Contact number:	0400 000 000	Relationship:		
17/12/2018		1003	Lizzy Member	0415 333 444	(03) 5962-9999	liz.member@gr
Emergency contact:	Fred Test	Contact number:	0359629999	Relationship:	Husband	
17/12/2018		1004	Lou Member	0400 123 456		lou.member@g
Emergency contact:	Alice	Contact number:	0444 444 444	Relationship:	Spouse	

Total number of records is 3
Maximum number is 25, Enrolled is 3, Available is 22

Close and return to Reports
Close and return to Courses

3. If required, click the Print button to print the list.

Print a course booklet

Which access levels can do this?

All levels aside from general members.

1. Click the Reports link in the left side menu.

Reports
2. On the reports screen, choose the Courses tab. The report you need is second from the bottom.
3. Configure the booklet:
 - o Choose a date range: The booklet will include courses running within these dates.
 - o Make any other selections as required, depending on what you would like to include in the booklet.

Word documents
Create a Course Booklet

Enter a date from: Enter a date to:

Show Book cover:

Show Course code:

Show Prerequisites:

Show Class Frequency:

Show a line separator between courses:

Trim whitespace:

Hide closed/finished courses:

Hide Admin only Courses:

Sort by: Parent + Course Code Parent + Start date Parent + Course Description

Create a Course Booklet in Word

4. Click the Create a Course Booklet in Word button.
5. A pop-up window should open, including a download link for the course booklet.
If the pop-up window doesn't open, you may need to enable pop-ups for this site on your web browser: Make sure you enable pop-ups **only** for this website, and not for untrusted sites.
6. In the pop-up window, click the **docx** button to download the course booklet.

Results:

7. Depending on your computer settings, the booklet may open automatically in Word. If it doesn't, look for the file in your downloads folder: The filename will be **CourseBooklet.docx**.
8. If the format of the course booklet isn't quite right, you can try some different settings in the report generation form. Alternatively, you can edit the file directly in Word.

Print member name badges

Detailed instructions are available in a separate document.

In brief,

- Name badges can be printed for multiple members at once, from **Reports - Members**.
- If your U3A has turned this feature on: Members who have an active membership for the current year can print their own name badges, using the Create a Name Badge button underneath the enrolments list on the View Member Details screen.

For Tutors

Enrolments list for your course: View, print, or email to yourself

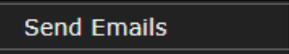
You can access enrolments lists for courses that you tutor. Tutors usually can't access enrolments lists for courses run by other tutors.

1. [Log in](#) to UMAS.
2. Follow the instructions under "[Print or email a contact \(class participant\) list for a course](#)" in the General Office Volunteers section of this user manual.

Email your course participants

You can email participants in courses that you tutor. Tutors usually can't email participants in courses run by other tutors.

1. [Log in](#) to UMAS.
2. Click the [Send Emails](#) link in the left side menu.

A dark grey rectangular button with the text "Send Emails" in white.

3. On the Send Emails screen, choose the Enrolments tab.
4. Configure the email:
 - In the first text field, you can add a custom **reply-to** email address (e.g. your own email address).
Note: The email will be sent from the U3A's general email address, and if a custom reply-to address is not set, the reply-to address will be the general address.
 - Add a CC address(es) if required, in the second field.
 - Fill in the **Subject** field.
 - Fill in the **email body**.
Note that you can use mail merge fields in order to personalise the emails. The available fields are shown near the bottom of the screen. A mail merge field must be inserted in **square brackets**, like `[this]`. The following screenshot shows use of the `[first_name]` field.
 - If you want to use an email that you have previously sent as a base, you can select from the emails available in the "Restore previous email" dropdown: This will fill the reply-to, subject, and email body fields with the content from the selected previous email.
 - **Choose a Course:** Choose the class that you want to email. (You can choose from any course that you lead.)
 - By default, the email will not be sent to members who are waitlisted for the selected course, or who are enrolled but whose membership is inactive. You can include these people by ticking the appropriate box(es), selecting from "Include Wait Listed", "Send only to Wait Listed", and "Include Inactive".
 - If you want to send a copy of the email to yourself, tick **Email the leader**.

Email Members with Enrolments

This process will send an email with the details from the Subject and Body

sally.tutor@gmail.com Optional. Replace for a different Reply To address

CC email address. Use semi-colon to separate email addresses. Optional. CC Field clear text

Class venue change for HISTRY19 this week Subject

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, list, indent, outdent, style, font color, background color, and font size.

Good morning [first_name],

Just a reminder that our History of Healesville class will meet out the front of the Memo Hall this week, instead of the usual venue.

See you there!

Best regards,

Sally Tutor

body p

Email automatically saved when sent. The Email will be sent from info@exampleu3a.org.au

Restore previous email: Please Select ▼

Choose File No file chosen

Choose a Course: HISTRY19: History of Healesville ▼

Include Wait Listed: Send only to Wait Listed: Include Inactive: Email the Leader:

Send Enrolment Emails

Personalised emails can be done by using these special field codes:
 [member_no],[first_name],[surname],[preferred_name],[email],[street1],[street2],[suburb],[state],[postcode]
 [subs_date],[member_type],[phone_home],[phone_business],[mobile],[emergency_contact],[contact_number]
 [relationship],[join_date],[join_year],[active]

5. Click the Send Enrolment Emails button.
6. You'll see a confirmation message: Check that the details are as expected, including the number of emails to be sent and the information regarding any attachments. If everything looks ok, click Yes to confirm and send the email.
7. A list will be displayed showing the members to whom the email has been sent. Members without a valid email address will need to be contact by phone or SMS.