

U-MAS User Manual: U-MAS for Members

U-MAS Version: 6.1 U-MAS for Members Version: 1.1.20210412



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Introduction

The U-MAS membership management system is widely used by U3As in Victoria. For members, the **U-MAS for Members** application allows you to manage your U3A membership and course enrolments online.

The manual is divided into two sections: one for current and renewing members, and one for new and prospective members.

For Current and Renewing Members

How to log in

 In your web browser, navigate to your U3A's website, and from there, find your way to your U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.

If you don't know your U3A's website address (URL), try a Google search of the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.

2. Now go to the **Log in link** in the navigation menu:



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

Log in	
Member no. or email address *	
Password *	Ø
SUBMIT	

4. On successful login, you will your membership details, and some additional items will be available in the navigation menu.

	Home		
•	Courses	My Member	ship
9	My Membership	5	•
	My Enrolments	To update your details, simply edit the form the bottom of the form. You can also change	
	My Invoices	NAME BADGE , and view your <u>enrolments</u> , i	nvoices and absences.
×	My Absences	Member Number 1412	Member Type Single Member
	Cart	Membership Active	Membership Expiry
	Checkout	Yes	18 Dec 2020
\otimes	Logout	First name *	Surname*

Having trouble logging in?

The following sections in this user manual may help:

- Forgotten password, or need to reset password: See What to do if you have forgotten your password.
- Forgotten membership number: See What to do if you have forgotten your membership number.

How to log out

1. Click the Logout link in the navigation menu:

 (\mathbf{x}) Logout

How to renew your membership

To renew your membership, you need to enrol in one or more courses: When adding courses to your cart, an appropriate membership subscription will be automatically added to the cart as well. After checkout, your invoice will be displayed, and paying this invoice will complete your membership renewal.

1. Log in to U-MAS for Members.

2. If you are not sure whether or not your membership needs to be renewed, check your member details on the My Membership screen: If the Membership Active field reads "No", and your Membership Expiry date is before today's date, your membership needs renewing.

Membership Active	Membership Expiry
No	20 Mar 2018

- 3. Enrol in one or more courses (see How to enrol in this user manual).
- 4. After checkout, view your invoice and pay your subscription fee (see How to pay your fees in this user manual).



When can you renew?

Most U3As offer memberships on a yearly basis.

For most of the year (roughly January to November, depending on the U3A), you can renew your membership and enrol in courses for the current year.

Towards the end of the year (around November or December, depending on the U3A), most U3As will go though a "rollover" process: Memberships and enrolments for the current year will end, and the course timetable for the coming year will be published. During this process, there may be a few weeks where you can't enrol in courses or renew your membership.

After a set date (determined by the U3A), enrolments will be opened, meaning that you can enrol in courses and renew your membership for the coming year. Most U3As will publish enrolment and term dates on their website and/or communicate this information via email.

How to enrol

You must be a member before you can enrol in courses. Your membership does not need to be active before enrolling: If you have an inactive membership, the process of enrolling and paying your subscription fee will activate it.

If you don't have a membership, see the How to join section of this user manual.

- 1. Log in to U-MAS for Members.
- 2. Click the **Courses** link in the navigation menu.



A course list similar to this will be displayed:



Courses			HELP
Current timetable (1 Jan 2021 - 31 Dec 2021) 🧪			
Courses: 1-6 of 6	FILTER	I< <	> >
Category LAN: Language and literature Course	Day of week	D	ates
German Language & Literature (Advanced)	Monday 15 Feb	o 2021 - 13 Dec	2021 🗸
Indonesian (Beginners)	Monday 25 Jar	n 2021 - 16 Nov	2021 🗸
Indonesian (Advanced) 🛛 🛧 New	Tuesday 6 Ju	l 2021 - 23 Nov	2021 🗸
German (Beginners) S Full	Friday 12 Feb) 2021 - <mark>15 N</mark> ov	2021 🗸
Category OUT: Outdoors			

- 3. If you're unfamiliar with navigating the course list, click the **Help button** on the top right of the Courses page, or see the tips in the How to View Course Details Without Joining section.
- 4. If you are interested in a course, **click on the course name** to open the course details.
- 5. After viewing the course details, if you would like to enrol, click the **Add to Cart** button at the bottom of the course details.

Availability	Accepting enrolments? Yes Capacity: 15, enrolled: 10, available: 5, waitlisted: 0	
Fee	\$0.00	
	ADD TO CART CLOSE	_

Note: If you are not eligible to enrol, or if you are already enrolled, you will see an explanatory note instead, and you will not be able to add this course to your cart.

6. Repeat steps 4 and 5 until you have added all your preferred courses to your cart.

Note that:

- Some courses may be full, but accepting waitlist enrolments: You can enrol on the waitlist, and the U3A will let you know if a space becomes available.
- $\circ\,$ Some courses my be finished or closed to enrolments: You can't enrol in these courses.
- Some U3As limit the number of enrolments allowed per member, in the interests of fairness.
- 7. **View your cart**: Click the Cart link in the navigation menu, or in the page header: You'll see a list of your selected courses, like the example below.

U3A	Network Victoria
-----	------------------

Cart					
		t membership: A n our cart if required	-	bscription	will be
	Code	Name	Start date	Status	Fee
Ĩ	BUSH20	Bushwalking Group	20 Feb 2020	ОК	\$0.00
Î	200IL01	Oil Painting (Beginners)	20 Jul 2020	ОК	\$10.00
Î	SUBS2020	2020 Subscription	20 Jan 2020	ОК	\$30.00
				Total	\$40.00
		(CLOSE CLEA	R CART	СНЕСКОИТ

Notes:

- If you do not have a current membership subscription, a subscription will have been automatically added to your cart. The cost of the subscription is your membership fee, and depends on your membership type.
- Most courses other than the membership subscription will incur no charge. However, occasionally a course may have a small additional fee to cover expenses such as supplies or travel costs.
- 8. Check the cart contents, and make adjustments if required.
 - $\circ~$ If you would like to remove a course from your selections, click the bin icon in the appropriate row.
 - $\circ~$ To remove all courses from your selections, use the Clear Cart button.
 - To add more courses to your selections, return to the Courses page, where you can add more courses to your cart.
- 9. When you're ready to confirm your course selections, click the **Checkout** button.

Note: For some U3As, you may be required to agree to the U3A's terms and conditions before proceeding with checkout.

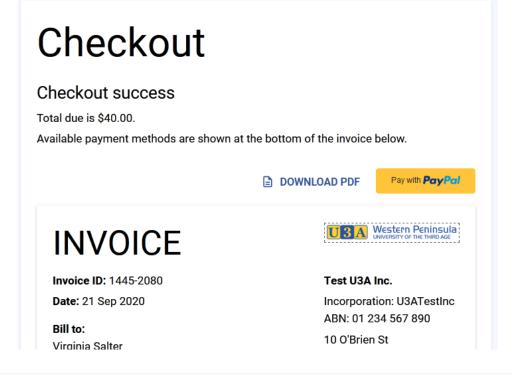




10. On checkout success, your invoice will be displayed.

The invoice will include a list of the courses in which you have just enrolled, along with any membership subscription or other fees.

If a fee is payable and your U3A offers PayPal, a PayPal button will be available so that you can pay online immediately. Other payment methods, if available, will be listed at the bottom of the invoice.



Where to next?

Paying your fees: See How to pay your fees in this user manual for details on how to pay.

Viewing your enrolments: Go to **My Enrolments** in the navigation menu to see a list of your current enrolments. (Most U3As will also send you an email containing this information, at the time of enrolment.)

How to pay your fees

For most U3As, you must enrol in one or more courses before you can pay your subscription fee.

Payment methods

Different U3As offer different methods of paying fees: These can range from offline methods such as cash or cheque, to online methods such as PayPal.

If your U3A uses U-MAS but does not offer online payment methods, you will still be able to enrol online, but will need to download or print out your invoice and pay it separately.



- 1. After you have enrolled in at least one course, a membership subscription for the current enrolment period will be added to your account, and an invoice will be generated.
- 2. To access your invoice, log in if you're not already logged in, and then go to **My Invoices** in the navigation menu: Your recent invoices will be listed. Any that have outstanding amounts will be highlighted in red, and the amount owing will be displayed in the *Due* column.

My Invoice	es					
My Inv 21 Sep 2019 - 21 Sep 20						HELP
Invoices: 1-1 of 1		SETTINGS	<	<	>	>
Invoice ID	Date	Total			Due	
1445-2080	21 Sep 2020	\$40.00			\$40.00	~

- 3. Click on the appropriate invoice in the list, to open the invoice details.
- 4. Payment options will be displayed at the bottom of the invoice: These will depend on the payment methods offered by your U3A.

		Γαία φυ.υς
		Due \$40.00
PayPal or credit card:	Bank deposit / EFT:	Other payment methods:
Use the PayPal button at the bottom of this invoice. You can use a credit card even if you don't have a PayPal account.	Test Bank BSB: 000000 Acc: 1234-1234 Reference: 1445-2080	 Cheque at the office, made out to Test U3A Inc. Cash at the office Cheque by mail, made out to Test U3A Inc., and sent to: 10 O'Brien St Armadale 3143 Victoria
		DOWNLOAD PDF

To pay offline, or by EFT (electronic funds transfer): Click the Download PDF button at the bottom of the invoice, to generate a PDF of the invoice: You can save this on your computer or print it out to refer to when paying your invoice. Pay the invoice according to the payment methods offered by your U3A.

 To pay online using PayPal, you will need either a PayPal account or a credit card: Click the PayPal button at the bottom of the invoice: A PayPal dialog will open, where you can choose to either log in and pay with your Pay Pal account, or select *Pay with Debit or Credit Card* to use a



card without a PayPal account.

After paying, be sure to wait while the invoice updates.

5. Once your payment has been conirmed, your invoice in U-MAS for Members will update to show that it has been paid. You will usually also receive an email confirming your payment.

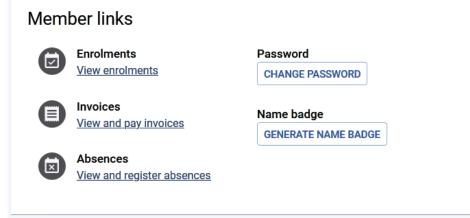
How to print your name badge

Some U3As provide an option for members to print their own name badges.

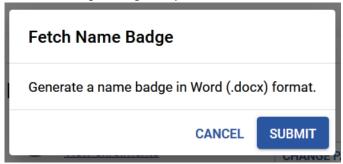
1. To access your name badge, log in if you're not already logged in, and go to My Membership.



2. Click the **Generate Name Badge** button in the *Member Links* section at the bottom of the screen.

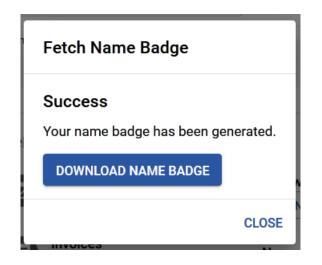


3. The name badge dialog will open: Click Submit.



 Once the name badge has been generated, a download button will be displayed: Click **Download Name** Badge to download the document: You can open the document in Microsoft Word for printing.





If you can't see the "Generate Name Badge" button...

- Have you enrolled and paid your membership fee for the current year? If not, you will need to do this first: See the How to renew your membership section of this user manual.
- Your U3A may not have turned this feature on. Some U3As will provide name badges to members using a different method, such as by mail or email. Check with your U3A if unsure.

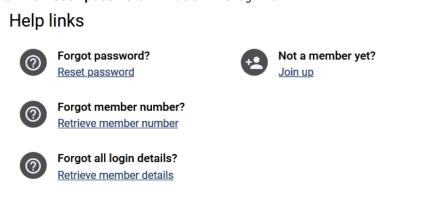
What to do if you have forgotten your password

If you know your membership number and if you provided your email address when you joined up, a password reset authorisation code can be emailed to you:

1. Go the Login link in the navigation menu:



2. Click the Reset password link below the login form.



3. Fill in your membership number and surname, then click the **Submit** button: You will receive an email from the U3A including an eight-character authorisation code.



Request password reset

Fill out and submit this form in order to receive a password reset authorisation code by email.

If you already have an authorisation code, you can ENTER IT HERE

Member number * -	 			
Surname *				
		SUBMIT		

From: U3A Western Peninsula <admin@u3awp.org.au> Sent: Tuesday, 18 May 2021 12:08 PM To: Virginia Salter <virginia.salter@me.com> Subject: U-MAS password reset

Dear Virginia Salter (member no. 1445),

Someone (presumably you) requested a password reset in U-MAS for Members. Below is your temporary authorisation code, which can be used in U-MAS for Members to authorise your password change.

6741973e

This code will expire in one hour, at 01:08:22 PM on 18 May 2021.

- 4. The next screen is the **Reset password** screen: Enter the authorisation code that was emailed to you.
- 5. Also enter a new password and confirm the new password, and then click the **Submit** button: Your password will be reset, and you can now proceed to log in.

SUBMIT	
	Ś
C Confirm new password *	C.
New password *	22
6741973e	
Member number * 1445	



If you don't know your membership number, or if there is no email address associated with your membership, then your U3A's membership coordinator or office volunteers will assist you: Follow the steps in this user guide under What to do if you have forgotten both your password and your membership number.

What to do if you have forgotten your membership number

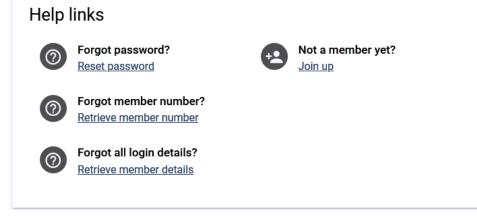
Firstly, it may help to do a quick search of your emails, looking for past correspondence from the U3A: Emails such as your New Membership email and subsequent course enrolment emails will usually include your membership number. If you can't find it, follow the steps below:

If you know your password you can quickly retrieve your membership number:

1. Go the Login link in the navigation menu:



2. Click the Retrieve member number link below the login form.



3. Fill in your password, first name, surname and year of birth, then click **Submit**.



Retrieve member
number

Fill out and submit this form in order to retrieve your member number.

Password *		Ø
First name *		
Surname *		
Year of birth *		
	SUBMIT	

4. If a matching member number is found, it will be displayed, and you can proceed to log in with this number.

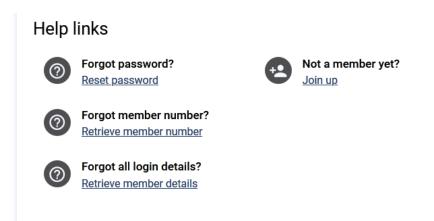
If you don't know your password, or if no matching member number is found, then the U3A's memberships coordinator or office volunteers will assist you: Follow the steps in this user guide under What to do if you have forgotten both your password and your membership number.

What to do if you have forgotten both your password and your membership number

U3A office volunteers will need to assist in retrieving your details. You can follow the steps below to send a message to the memberships coordinator. Alternatively, you can contact your U3A office directly.

- 1. Go the Login link in the navigation menu:
 - Log in
- 2. Click the Retrieve member details link below the login form.





- 3. Fill in the form. (This information is needed so that U3A volunteers can find you in the membership database.)
- 4. Click the **Submit** button when finished.
- 5. Your message will be sent to the U3A memberships coordinator. U3A office volunteers will contact you and retrieve your membership details for you.

How to update your details

- 1. Log in to U-MAS for Members.
- 2. Go to My Membership

f	Home		
	Courses	My Members	ship
	My Membership	To update your details, simply edit the form belo	-
	My Enrolments	the bottom of the form. You can also change yo	
	My Invoices	NAME BADGE , and view your <u>enrolments</u> , invo	<u>vices</u> and <u>absences</u> .
×	My Absences		Member Type
Ľ	My Absences	1412 5	Single Member
Ξ.	Cart	Membership Active	Membership Expiry
\checkmark	Checkout	Yes	18 Dec 2020
\otimes	Locout	First name *	Surname *
\odot	Logout	Francis	owiehom

- 3. On the My Membership screen, you can change your details including:
 - Name, address, phone and email
 - Emergency contact person
- 4. After making your changes, click the **Save** button near the bottom of the screen.

Need to change course enrolment details?

You can enrol in more courses, so long as enrolments are open: See How to Enrol in this user manual.

For all other enrolment-related changes, you'll need to contact the course coordinator or U3A office volunteers to make the changes for you.



How to change your password

If you know your password and would like to change it, follow the steps below.

If you have forgotton your password, see What to do if you have forgotton your password in this user manual.

- 1. Log in to U-MAS for Members.
- 2. Go to My Membership



3. In the *Member links* section at the bottom of the screen, click the **Change Password** button.

Mem	ber links	
	Enrolments View enrolments	Password CHANGE PASSWORD
	Invoices View and pay invoices	Name badge GENERATE NAME BADGE
	Absences View and register absences	

4. Fill in the form with your old password, new password, and confirm new password. Then, click the **Submit** button.

Change Password	
Old password	Ś
New password	Ś
Confirm new password	Ø
	CANCEL SUBMIT

What courses am I enrolled in?

This information is available from My Enrolments:

1. Log in to U-MAS for Members.



2. Click the **My Enrolments** link in the navigation menu:

My Enrolments

- 3. On the My Enrolments screen, you will find:
 - A table showing your **Membership Subscriptions**
 - You can click on the invoice number shown in the Invoice column, to view the invoice for any membership subscription.
 - $\circ~$ A table showing your ${\bf Enrolments}$

You can click on the **Show** button in the Details column, to view the full details for any course. **Tip**: By default, enrolments for the current timetable date range are shown. You can use the **Settings** button or the pencil icon to change the date range.

Enrolments 1 Feb 2021 - 31 Dec 2021 🧪				
Activity	Start	End date	Location	Detail
Russia from Romanovs to Putin 21CUL02	6 Jan 2021 2:00 PM	17 Nov 2021	The Court House	SHOW
Oil Painting (Advanced) 21PAINT	15 Jan 2021 2:00 PM	27 Nov 2021	The Court House	SHOW
Indonesian (Reginners)	25 Jan 2021			

- A table showing your Waitlist Enrolments
- 4. If you'd like to download a copy of your enrolments, use the **Download PDF** button: You can save the PDF to your computer or print it out.

When does my course start?

This information is available from **My Enrolments**:

- 1. Log in to U-MAS for Members.
- 2. Click the My Enrolments link in the navigation menu:

My Enrolments

3. The **Enrolments** table displays the start date and time for each of your courses.



Enrolments Feb 2021 - 31 Dec 2021 🧪				
Activity	Start	End date	Location	Detail
Russia from Romanovs to Putin 21CUL02	6 Jan 2021 2:00 PM	17 Nov 2021	The Court House	SHOW
Oil Painting (Advanced) 21PAINT	15 Jan 2021 2:00 PM	27 Nov 2021	The Court House	SHOW
Indonesian (Reginners)	25.lan 2021			[]

Where is my course held?

This information is available from My Enrolments:

- 1. Log in to U-MAS for Members.
- 2. Click the My Enrolments link in the navigation menu:

My Enrolments

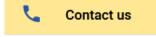
3. The **Enrolments** table displays the venue name for each of your courses.

Enrolments Feb 2021 - 31 Dec 2021 🧪				
Activity	Start	End date	Location	Detail
Russia from Romanovs to Putin 21CUL02	6 Jan 2021 2:00 PM	17 Nov 2021	The Court House	SHOW
Oil Painting (Advanced) 21PAINT	15 Jan 2021 2:00 PM	27 Nov 2021	The Court House	SHOW
Indonesian (Reginners)	25.lan 2021			

4. Click the **Show** button to view full course details, including venue address.

How do I cancel my enrolment in a course?

Please inform your U3A's course coordinator or office volunteers, and they will cancel your enrolment for you. Contact details are usually available by clicking the **Contact Us** link in the navigation menu, or by checking the U3A's website.





How do I report my absence from a course?

Class tutors/leaders appreciate a warning if you know you will miss a class.

Some U3As provide an option for members to report absences through U-MAS. If available, you can do this through the **My Absences** link in the navigation menu:

- 1. Log in to U-MAS for Members.
- 2. Click the My Absences link in the navigation menu:

My Absences

- 3. Fill in the form:
 - **Select Course**: Select the course from which you will be absent. Select *All Courses* if you will be absent from all courses.
 - Select Reason: The reason for your absence. Choose from "Holiday", "Illness" or "Other".
 - Enter the Start Date and Finish Date.
- 4. Click the **Submit** button: Your absences will be submitted, and your list of upcoming absences will be displayed below the form.

IY ADS	ences			
Submit Absence Select Course All Courses Start Date *	es •	Select Reason * Other Finish Date * 21/09/2020		Ť
21/09/2020				
21/09/2020		UBMIT		
	2			
21/09/2020 Current Absenc Course	2		Finish Date	Reason

Can't see the My Absences link?

If this option is not available, your U3A will have a different method of reporting absences (such as informing the Course Coordinator or class tutor/leader directly). Check with your U3A if unsure.



For New and Prospective Members

How to join

First, you need to sign up as a new member. After you have joined, you will be able to enrol in courses and pay your membership subscription fee.

Most U3As also allow offline joining, however online joining is the recommended method where possible.

Note for previous members

If you are or have ever been a member of this U3A, even if your membership has lapsed, do not join up as a new member.

Instead, you should renew your membership: See the How to renew your membership section of this user manual.

- In your web browser, navigate to the U3A's website, and from there, find your way to the U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.
 If you don't know the U3A's website address (URL), try a Google search for the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.
 Click the Loin link in the navigation many.
- 2. Click the **Join** link in the navigation menu.



3. Fill in the form. Fields marked with an asterisk (*) are required.



ut and submit this form	in order to join U3A Wes	tern Peninsula & Distric	ct.
0	2	3	
Part 1	Part 2	Part 3	Review, submit
ember Type *	Pa	rt 1	
rst name *		Surname *	
referred name			

4. There are three parts to the form. Click **Next** at the end of each part.

Choosing a password

On part three, you will need to enter a password: It must be at least eight characters long, and contain a combination of upper and lowercase letters and numbers. Make sure you choose a password that is difficult to guess.

Keep your password safe: You will need it to log in to U-MAS.

- 5. **Review**: At the end of the form, review the information you have provided. If you need to change something, simply use the **Back** button at the bottom of the form to go back a step.
- 6. When you've finished, click the **Submit** button at the bottom of the form.
- 7. On successful submission, a message like this will be displayed:



Join			
Fill out and submit this form	in order to join U3A Wes	tern Peninsula & Distric	ct.
Ø			\checkmark
Part 1	Part 2	Part 3	Review, submit
	Suc	cess	
Congratulations Ali, you have	ve successfully joined	U3A Western Peninsu	la & District.
Your member number is:			
	14	72	
Please write your member r	number down before p	roceeding.	
You can now log in to U-MA that you specified when join	•••	number or your email	address, and the password
	LOO	G IN	

Your membership number

The message will include your new membership number. You will need this number in future, so write it down.

Congratulations, you have joined the U3A.
 Proceed to the Log in link if you would like to log in now.



Your next step is to enrol in one or more courses, and then pay your membership subscription fee. See the How to enrol section of this user manual for details.

How to view course details without joining

- In your web browser, navigate to the U3A's website, and from there, find your way to the U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.
 If you don't know the U3A's website address (URL), try a Google search for the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.
- 2. Click the **Courses** link in the navigation menu.

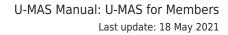


A course list similar to this will be displayed:



rrent timetable (1 Jan 2021 - 31 Dec 2021) 🧪						
Courses: 1-6 of 6	FILTER	< >	>			
Category						
LAN: Language and literature		_				
Course	Day of week	Dates				
German Language & Literature (Advanced)	Monday 15 Feb 20	021 - 13 Dec 2021	~			
Indonesian (Beginners)	Monday 25 Jan 20	021 - 16 Nov 2021	~			
Indonesian (Advanced) 🛛 📩 New	Tuesday 6 Jul 20	021 - 23 Nov 2021	~			
German (Beginners)	Friday 12 Feb 20	021 - 15 Nov 2021	~			

- 3. To more easily find courses that are of interest to you, using the **Filter** button. See Tips below for details.
- 4. To view the details for an individual course, click on the course name in the list.



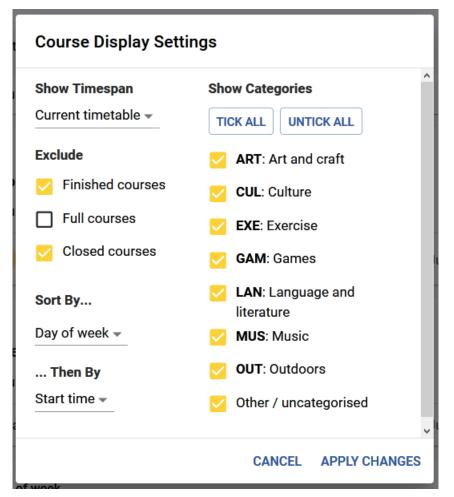


Indonesian (Advanced)	★ New The Court House 6 Jul 2021 - 23 Nov 2021 ∧		
New!	Indonesian (Advanced) is a new addition to the timetable		
Course code	21IND002		
Category	LAN: Language and literature		
Course type	Short Course		
Detail	Advanced Indonesian language and culture		
Additional information	Participants are expected to have completed at least 50 hours of Indonesian language study, to be able to hold a conversion on familiar topics, and to read texts such as newspaper articles		
Location	The Court House 42 O'Brien St Healesville 3777		
Timetable	Weekly: Weekly Course Day: Tuesday, 1:00 PM - 2:30 PM Dates: 6 Jul 2021 - 23 Nov 2021 Next date: 6 Jul 2021		
Availability	Accepting enrolments? Yes Capacity: 12, enrolled: 0, available: 12, waitlisted: 0		
Fee	\$0.00		
	CLOSE		

Tips for using the course timetable

• **Sorting and filtering**: Use the **Filter** button at the top of the course list to open the course settings dialog:





- **Show Timespan**: Choose the timespan to view. Options include "Current timetable", "this week", "next week", "next month", etc.
- $\circ~$ Exclude: Choose whether to exclude finished, full and/or closed courses.
- Sort By...: Choose the top-level sort order. Options include "Category", "Day of week", "Course type", etc.
- ... Then By: Choose the second-level sort order.
- Show Categories: Choose which categories to display. Available categories will vary depending on the U3A.
- Icons:
 - When you are logged in, any courses in which you are currently enrolled or waitlisted will be marked with a blue letter E or W respectively.

E Enrolled Waitlisted

 $\circ~$ Any course that is currently in your cart will be marked with a yellow letter C.

C In cart

 $\circ~$ Any course from which your enrolment has been deleted will be marked with a grey letter D

D Deleted

 Some courses may have an additional icon, depending on their status: Closed to new enrolments: Grey lock icon.



Full and only accepting waitlist enrolments: Grey crossed icon. New (recently added to the timetable): Blue star icon.

Closed	🗙 Full	🛨 New

• **Help**: Click the **Help** button on the top right of the courses page for further information.

If you decide that you would like to enrol in a course, you need to first make sure that you are a member (see the the How to join section of this user manual if required), and then log in to enrol.