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Michael Hanlon and EC Software GmbH

**[Type the company address]**

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Michael Hanlon

**2025**

**U3Admin.org.au Help**

Contents

<%CHAPTER\_HEADING1%> 3

<%CHAPTER\_HEADING2%> 3

<%CHAPTER\_HEADING3%> 3

<%CHAPTER\_HEADING4%> 3

<%CHAPTER\_HEADING5%> 3

<%CHAPTER\_HEADING6%> 3

# Introduction

This online help document provides assistance navigating and using the U3Admin.org.au website. U3Admin.org.au is designed to provide membership, enrolment and other administrative services to your University of the 3rd Age (U3A).

The structure of this document for the most part follows the Administration Portal's menu structure. Don't worry if you do not see all the menu options discussed in the document. It simply means you are not authorised to view them. If you feel you should have access please refer to your security or systems administrator.

There are two ways to access this document...

|  |  |
| --- | --- |
|  | By clicking the Help icon at the far right-hand side of the menu bar  This method will provide complete access to the help document in a separate tab within your browser. Use this option to get a complete overview of all tasks and options available. |
|  | By clicking the help button within a procedure.  This method will provide help that is context sensitive to the procedure in which you are working. Use this option to get specific help on a given procedure. |

Acknowledgement

This documentation was created using **Help+Manual** software provided by <https://www.helpandmanual.com/>. The software is provided free of charge to not-for-profit organisations for which we are grateful.

# 2025 Version History

**Version 2025.9.Current**

Organisation Details

1. Added a new field, **Ceased Reasons** to enter reason a member may cease a membership.

Add/Edit Participants

1. Added a new field, **Ceased Reason**. This field will be enabled when the **Ceased Date** contains a valid date. It enables you to select a reason the person ceased membership.
2. The **Ceased Date & Reason** columns are displayed id the current tab is *Ceased* or *All*.

Ceased Member Report

1. The **Ceased Reason** is now printed on the report.

**Version 2025.9.16**

System

1. DevExpress 25.1. 5 minor update.

Member Portal | Request Enrolments

1. An issue that caused high CPU server usage has been resolved.

**Version 2025.9.14**

Enrolment Email Notification

1. Images are removed from the course description

Member Portal | Request Enrolments

1. The course description HTML text is modified to ensure correct display in dark mode...
   1. Text with a white-ish or dark-ish color attribute will have that attribute removed.
   2. Text with a non-white or non-dark color attribute will have the saturation of that color increased.

**Version 2025.9.12**

Member Portal | Request Enrollments

1. The course description is now contained within an expandable text component. The component displays a shortened version of long text and a **Show More** button. Full text is displayed when the button is clicked.

Course Schedule Report

1. A new parameter, *Exclude Images From Report* has been added with a default of *Yes*. If the default is selected, all images in the Course Description will be removed from the report.

Correspondence Hub | Search

1. All Search input parameters are now contained within the grid toolbar. This allows more screen space to be allocated to the results grid and also allows parameters to be changed in full screen mode.

**Version 2025.9.5**

New Reports

1. Reports | Participant Reports | Participant Trial Balance. A report of all financial transactions for each member. This report is akin to a detailed Accounts Receivable Trial Balance in traditional accounting software. By default, the report will print for outstanding fees only but this can be changed by selecting **No** to the parameter, *Show Outstanding Only?*.

**Version 2025.9.2**

Bank Data Import

1. Corrected an issue that could cause receipts to have a processing year of zero.

New Reports

1. Reports | Participant Reports | Member Financial Status. A report of all fees, monies allocated and balance due for each member. This report is akin to a summary Accounts Receivable Trial Balance in traditional accounting software in summary form. By default, the report will print for course fees only but this can be changed by selecting **No** to the parameter, *Show Course Fees Only?*.
2. Reports | Course, Class & Schedule | Course Fees Report. A report of students, their course fees due, monies allocated and balance for each course that charges fees.

**Version 2025.8.31**

Enrol Participants

1. You can now adjust fees for one or more enrolled participants via this module.
2. The **Fees Due** column now reports student fees due for the course, not total fees due.

My Leadership Role | Manage Enrollments & Email or SMS Students

1. The **Fees Due** column now reports student fees due for the course, not total fees due.
2. You may now filter the grid via the **Fees Due** column. This, for example, allows you to select those students with fees owing only.

Note: The **Fees Due** column is only displayed if fees have been defined for the course.

My Leadership Role | Student Fees Analysis

1. The menu option name has been changed from *Student Fees Paid* to *Student Fees Analysis.*
2. A full analysis of student fees due, paid and balance for each fee type is now provided.

Leader Reports | Class Contact List

1. The *Class Contact List* now displays a **Fees Due** column. The amount displayed is the fee sue for the course only.

**Version 2025.8.29**

Attendance Analysis

1. Items in the *Filter Area* now wrap if the total width exceeds the device's viewport.

Home Screen

1. The Home screen now has a maximise button.

Financial Status Enquiry

1. An error that was generated after during fee adjustment has been corrected.
2. You may now filter the list by Course. This allows all participants in a course to have their fees adjusted in one transaction. The workflow is as follows...
   1. Select the course required from the dropdown editor at the top of the grid. The system will display only those participants in the selected course.
   2. Select the required participants from the grid.
   3. Click the **Adjust Fees** button on the toolbar. Enter the adjustment details as requested and click **Ok**.

**Version 2025.8.15**

Add/Edit Courses

1. The Course Description editor now has a *Sanitize* button. Clicking this button will remove potentially malicious code from your HTML text. It should be used after copy and pasting text from another website which is quite a dangerous thing to do. In addition to cleansing your HTML of dangerous content the software will also...
   1. Remove color from both the foreground and background.
   2. Remove Font-Style and Font-Size attributes.

Removing color and font properties will make your text consistent whether it is displayed on-screen or on a report.

Reports

1. A new sub-menu called *Custom Reports* positioned under *Reports* has been added. Custom reports are read-only versions of the major data entry modules within the system. They show the grid and allow customisation but they do not allow the addition, edit or deletion of data. They are intended for use by those with the *Report View* authorisation role only to view data and create Excel or PDF reports.
2. Custom reports are available for participants, contacts, courses and venues. It is also available for member's Financial Status.

Analysis

1. A new sub-menu called *Analysis* positioned under *Reports* has been added. This sub-menu will contain Pivot Tables to allow you to "slice and dice" your data. Pivot tables allow advanced analysis of numeric data.
2. Added *Attendance Analysis* to the sub-menu.
3. Added *Member Fee Analysis* to the sub-menu

Member Portal | Your leadership role

1. A new menu option titled, *Venue Details* has been added. This will provide details of the class venue when clicked.
2. A new menu option titled, *Student Fees Paid* has been added. This provides an analysis of course and term fees paid by students in the course.

Financial Status Enquiry

1. The member financial status calculation has had a performance improvement. Typically, the time to calculate financial status for all participants has gone from in excess of one minute to about a couple of seconds.

Grid reporting

1. You may now create a grid report title extending over multiple lines.

**Version 2025.7.29**

Class Schedule (Public View)

1. Corrected an issue that caused the report to display compressed.

Grid reporting

The algorithm to calculate printed column widths from screen column pixels has been improved.

1. The **Fit to page** print method now uses relative column widths in its calculation providing a much neater report with less text wrapping.
2. The **Use Grid** column width calculation option has been changed to **Fit column width**. This reflects the new calculation which uses actual column widths to create the report.

**Version 2025.7.24**

System

In this update our User Interface has been updated to the new Fluent theme introduced by our component supplier, DevExpress. The Fluent theme is an initiative by Microsoft to define a modern, responsive and performant User Interface for use in web applications. For more information, refer to [Fluent 2 Design](https://fluent2.microsoft.design/).

For the most part there is little difference between the new theme and the previous choices available to you. It does however remove the need to download multiple themes to your device which should make system startup a little snappier.

1. DecExpress component software updated to version 25.1
2. All modules have been reviewed to ensure compliance with the new fluent theme.

Theme & Settings

1. This module has been re-written to reflect the new DevExpress fluent theme convention...
   1. Legacy themes have been removed with the choices being restricted to *Fluent Light* and *Fluent Dark*.
   2. An additional parameter, *Accent Color* has been added which allows each user to select the primary or accent color to their preference.

Report Preview modules

1. All system reports are now displayed in full screen which occludes the menu. To return to the menu, click the green exit button on the report menu.

Add/Edit Participants & Member Portal / Member Details

1. To comply with current best practice, *Birth Date* entry is now restricted to month and year only. All display and reporting now prints the Birth Date as month and year. Calculation based on birth date assume the day as the 15th of the month. Birth Date entry remains optional.

Admin | Member Fees

1. The parameters previously required to calculate Merchant Fees have been replaced with instruction on how to charge a surcharge within the Eway portal. Be aware the RBA plans to ban card surcharges from 1st July 2026.

Member Details Flyout

1. The Member Details flyout displayed when the details button is clicked on a membership grid now has a *Print* button*.* This will create a PDF report of the current displayed grid being either, Statement of Account, Enrolment History, Leadership History or Leadership History.
2. An issue that caused the system to freeze if the Member Details flyout was activated while the grid was maximised has been addressed. To resolve this issue, the grid is now automatically returned to the normal state before the flyout is displayed.

Grid Toolbar Export Options

1. The *Export* button has been replaced by a button titled, *Excel*.
2. Export all or export selected options have been removed from the drop-down. There is now a *Selected Only?* button to display only rows selected. The export option only exports visible rows.
3. When you click the *Excel button* a popup dialog will be displayed giving you the ability to input a title. The title is used as the downloaded data file name.

New Grid Print Button

1. You can now create a PDF report from the grid's data.
2. When you click the *Print button* a popup dialog will be displayed giving you with the ability to input a title. The title is used as the downloaded data file name as well as the report title for the report. In addition, Pdf reports have the following options...
   1. *Print Portrait?* by default, reports will be created in landscape orientation. Tick this box to display in portrait mode.
   2. *Column Widths*. Your options are...
      1. *Fit To Page*. The default is to print the report so that it will fit on one page.This may result in excessive word wrapping to make each column fit.
      2. *Use Grid*. The alternative is to use the relative grid column sizes when creating the report. if *Auto Fit* has previously been applied to the grid, this option will result in minimum word-wrapping on the report. However, reports with many columns may extend over more than one page.
   3. *Font Size*. A choice of common font sizes, the default being 8pt.
   4. *Page Size*. You may choose A4 or A3 page size.

Combined with the ability to manipulate the grid by sorting, grouping, filtering and column layout, you now in effect have a report writer to create your own PDF reports.

Add/Edit Courses - Description Images

1. Images inserted into course descriptions must now be limited to 100KB in size. This has been done to ensure our software remains performant for all members. An image can be made significantly smaller by...
   1. Resizing the image. A maximum image width of 480 pixels is recommended.
   2. Compressing the image using tools such as [TinyPNG](https://tinypng.com/)

**Version 2025.7.4**

System

1. By default, the Sidebar menu is now hidden on small screen devices such as tablets or laptops. This change has been made to increase the screen space available to application content. To activate the menu you may...
   1. Hover over the menu button at the top left of screen, or
   2. Click the menu button at the top left of screen, or
   3. Press the Escape (Esc) key.
2. The Sidebar menu button is now hidden on the report viewer. To exit the report press the exit button on the report menu. This is the button with the green exit icon.
3. Application title & subtitle have been moved to the middle of the screen on small screen devices. This change was made to increase the space around the *Menu*button to highlight it and prevent it from being accidentally clicked.
4. The new menu behavior is automatically enabled depending on screen. If the behavior is not to your liking, go to Settings | Theme & Settings and...
   1. Select *Menu Behavior* of Laptop to force the new behavior, or
   2. Select *Menu Behavior* of Desktop to force the old behavior, which displays the Sidebar menu by default.

Note that the default behavior of these changes have no effect on Large screen devices or those using the *Top Menu* setting.

**Version 2025.6.27**

System

1. DevExpress components upgraded to 24.2.8.

Grid Toolbar

1. A new toolbar button, *Selected Only?* is now displayed if the grid has a selection column. Clicking this button will display the selected records only. Clicking the button again will display all records.

Class Attendance

1. Corrected issues when clicking the *Set Selection, Apply Student Leave* and *Reset Selection* buttons multiple times.

**Version 2025.6.20**

Member Fee Calculation

1. A renewing member will now receive adjusted membership fees if paying in terms 2, 3 or 4. Previously the adjusted fee was only available to new members. Note that all membership fees are still calculated "on the fly" and are not persisted to the database. To perform the calculation, the system therefore first calculates a *Fee Due Date*. For new members this will be the join date. For renewing members it will be the date of the first receipt for the year or the current system date if there is no receipt. The Membership Fee for the term in which the *Fee Due Date* falls within the enrollment period will be charged, There is an assumption in this calculation that the first receipt received each year for each member is for membership fees.

Cancel Class

1. The *Current Cancellations* tab now lists all cancellations for the current term thru to the end of year. Previously, only cancellations for the current term were displayed.

**Version 2025.6.10**

Login & Identity

1. Two factor authentication is no longer required for those accessing the software via the **U3A desktop** application. While not a requirement, it is still encouraged.

Membership Fees

1. The software now allows Eway merchant fees to be separated rather than included in membership. If separated the merchant fee will be charged i*n addition to* rather than included in the membership fees. To enable this, three new fields have been added...
   1. Separate Merchant from U3A Fees?
   2. Merchant Fee fixed amount, and
   3. Merchant Fee percent amount.

Refer to [Membership Fees](#Membership_FeesD7AD44D4) for details.

Add/Edit Courses

1. You may now enter a separate fee for each Term rather than one fee that covers all terms.

Admin Member Portal

1. The Terms & Conditions prompt is no longer displayed when processing fees or enrollments on behalf of a member. This means you are no longer required to accept the terms & conditions on behalf of the member.

**Version 2025.6.5**

Lucky Member Draw

1. The new *Lucky Member Draw* has been added to the **Participation** menu. For details click [Lucky Member Draw](#Lucky_Member_DrawBD0E4B4E).

**Version 2025.5.30**

System (Database operations)

1. Improvements to database write conflict detection and "last write wins" strategy.

Course Fees Due Enquiry

1. This module has been deprecated and removed from the menu. It's functionality has now been duplicated by the new *Member History Flyout* found in **Add/Edit Enrolments**.

Add/Edit Receipts

1. A refund may now be entered as a negative value.
2. Added Member History flyout

Add/Edit Fees

1. Added Member History flyout

Cash Receipt pro-forma

1. The cash receipt will new be titled **Refund** if the receipt amount is negative.

Member History Flyout - Statement of Account

1. Fee & receipt transactions are now listed in chronological order.
2. There is a new button titled **Allocate**. This is a drop-down consisting of three options...
   1. **Allocate**. This will allocate receipts against fees. Any unallocated items will be shown at the bottom of the list. The allocation is performed in chronological order and is capable of allocating a receipt against multiple fees.
   2. **Outstanding Only**. This will also allocate receipts against fees but will only display those items that could not be allocated.
   3. **Unallocate**. Re-display the transactions in chronological order.

**Version 2025.5.23**

New Participant Details Flyout

A column titled *Details* has been added to the grid in the procedures, ***Add/Edit Participants*** and ***Enrol Participants***. This column contains a button on each row that when pressed will activate a flyout for the selected participant. The flyout will contain three tabs...

1. the first providing the participant's Statement of Account
2. the second, all enrolment details for the current year and
3. the third, attendance history for the year.

**Version 2025.5.16**

Database Backup

1. A new menu option **Admin | Database Backup** has been added. This will create a dump of your database as an Excel workbook, password protect it and download it to your PC.

Member Badges

1. Badge for member's carers are now printed.

Add/Edit Courses

1. If a course is created in either the Simple or Activity view, then it must now be completed in either the Simple or Activity view. You cannot change to Detail view while creating that course. Once the course is created and saved, you may select any view you require.
2. The field, *Due Date* has been added to the Course Fees group. If left blank, fees will be due and payable immediately. Otherwise, they will fall due on the date entered.
3. The field, *Due Date Adjustment* has been added to the Term Fees group. Normally, term fees fall due as at the start of term. This will be adjusted by the number of weeks entered into this field.

**Version 2025.5.9**

In this update, support for a person's carer has been added. The carer's details will be added to the various reports available to leaders. Optionally, a carer may receive a copy of email/SMS sent to the participant.

Add/Edit Participants

1. A person's Carer may now be added to the Participant record. To do so, click the *Carer's Details* tab next to the *In Case of Emergency* tab. You will be prompted to add the Carer's name, their employer's company, phone number and email address.

Member Portal - Member Details

1. A person may now add their Carer to the Participant record. To do so, click the *Carer's Details* tab *at the top of the form, next to the Your Details* tab. You will be prompted to add the Carer's name, their employer's company, phone number and email address.

**Version 2025.5.8**

Enrol Participants

1. An issue that caused participants to be omitted from leader's reports has been corrected.
2. The **Communicate** button is now a drop-down with two options...
   1. *Selected Students Only*. The system will send email to the selected class students only.
   2. *Selected Students & Leaders*. The system will send email to the selected students plus the class leader(s).

Attend Class

1. The **Communicate** button is now a drop-down with two options...
   1. *Selected Students Only*. The system will send email to the selected class students only.
   2. *Selected Students & Leaders*. The system will send email to the selected students plus the class leader(s).

**Version 2025.5.2**

Login & Role Assignment

1. The login edit form now contains the button, **Reset 2FA**. Two-factor authentication will be disabled for the selected login when this button is clicked. If the login has access to the administrative website the mandatory 2FA grace period will be reset to 30 days. Use this button when an administrative login is to be reassigned to a new person or a member has requested that it be removed from their account.

Administrative website - Home page

1. You are now advised via a small flyout window when a version has changed. Clicking the version button will hide the flyout until the next change.

**Version 2025.4.30**

System

1. Enforce 2FA for admin website

**Version 2025.4.27**

Member Portal (Administration)

1. The system no longer hides the *Process on behalf of* combo box after a member has been selected. This allows another member to be selected without the need to return to the Member Portal menu first.

**Version 2025.4.17**

Class Attendance

1. You may now delete a class date and its attendance history by clicking the trash button after a class date has been selected.

Attendance Not Recorded

1. The *Attendance Not Recorded* grid no longer displays entries for Off-Schedule courses.
2. Issues with the display when a class date and/or time has been changed have been corrected.

Attendance Summary

1. Issues with the display when a class date and/or time has been changed have been corrected.

**Version 2025.4.10**

Two-Factor Authentication

1. Reworked User Interface to improve workflow.
2. Included video on Microsoft Authenticator.

**Version 2025.4.9**

Add/Edit Courses

1. A new field, *Disallowed Reason* has been added to the Course record. This field is enabled when the field, *Auto Enrol?*  is un-checked. It allows a short reason (maximum of 50 characters) to be entered to explain why auto-enrolment is not enabled. The reason is then printed on the *Class Schedule*.

**Version 2025.3.28**

Communication

1. Email now has a default delay of 1 hour.
2. Implemented check, re-check and cross-check features...
   1. **Check** The total members selected, the number financial & the number not financial are displayed in an alert box.
   2. **Re-check**. The number selected and the number of attachments are displayed in the "Are you ready" message dialogue.
   3. **Cross-Check**. Any broadcast email queued and ready to send are displayed in a grid in **Add/Edit Participants**.

**Version 2025.3.27**

Automatic Enrolment

1. All future classes are now automatically enrolled. Thus a weekly class starting in a future term will be automatically enrolled.
2. The same caveats regarding the random allocation period as per 2025.3.25 apply.

**Version 2025.3.25**

Automatic Enrolment

1. Erolment requests for classes that are in a future term but have an occurrence of "Once Only" are now processed on creation. The exception to this is if ...
   1. Random allocation is enabled, and
   2. the random allocation period is **per semester** and
   3. the current ernolment period is in the first semester, and
   4. the class will held in the 2nd semester

or,

* 1. Random allocation is enabled, and
  2. the random allocation period is **per term**.

**Version 2025.3.21**

Transactional Email

1. The Enrolment Request pro-forma email now has specific text to explain a Waitlisted request when the request is for a class in a future term.

Broadcast Email (Communicate)

1. You now have the ability to enter an email Preheader when composing email to members via *Add/Edit Document Templates* or the *Communicate* module. A Preheader may include emojis.

**Version 2025.3.10**

Transactional Email

All transactional email have been re-written for consistency in layout.

1. Transactional email text and format reviewed for "mobile-first" layout.
2. Automatic support for Dark & Light email styles.
3. Consistent preview text with emoji.

**Version 2025.2.28**

Ai Chat (PREVIEW)

1. Improved accuracy and reliability.
2. Can now respond with class enrollment and waitlist details.

Course By Leader Report

1. Class details are now correctly printed when printing the report for clerks.

**Version 2025.2.21**

System

1. DevExpress components updated to version 24.2.5.

AI Chat (PREVIEW)

1. A new menu option titled **AI Chat (PREVIEW)** is now available as the last item on the *Participation* menu. It allows chat with an AI trained on the *Class Schedule*.

**Version 2025.2.17**

AI Assistants

1. The Rich Text Editors found in our *Communicate* and *Add/Edit Document Templates* now comes with AI Assistance. To access the assistant you must select some text and right-click the mouse. The assistants will be found in the first entry of the context menu.
2. The HTML Editor that allows rich text descriptions to be entered in *Add/Edit Courses* now comes with AI Assistance. The assistant is accessed as the first item on the toolbar menu. Note that after inserting or replacing text you must enter at least one more character to ensure the AI text is accepted by the editor. This is simply achieved by pressing the *Return* key.

Add/Edit Courses

1. There is now a *Description* column on the grid. Each row contains an *Edit* button in that column. When clicked, a pop-up form is displayed that allows you to edit the course description. This change was made to overcome a number of issues when editing the description on the main edit form.

**Version 2025.2.16**

Member Portal - Require Terms & Conditions agreement

1. The requirement to agree to the U3A's terms & conditions has now been extended to include Enrollment requests & withdrawals.
2. The date & time the terms & conditions were agreed to is now recorded on the participant's record as a read-only field.
3. The requirement to agree to the terms & conditions will be re-requested every 120 days.

**Version 2025.2.15**

Member Portal - Member Details

1. if the ICE Contact or ICE Phone contain invalid data when the *Save* button is clicked, the software will automatically scroll to those fields as well as highlight the error.

Member Portal - Fee Payment

1. A member is now required to agree to the terms & conditions before fee payment is allowed.

Organisation Details

1. You may disable the requirement to force a member to agree to the terms and conditions before fee payment by clicking the check box on the *Terms & Conditions* tab.

**Version 2025.2.9**

Support Request Page

1. Changed text to remind member to be courteous & respectful.

Member Portal - Manage Enrollments

1. Allocating enrollments from the waitlist is now a background task that is queued for processing when exiting the module. Members can expect an enrollment notice within seconds of completing their request.

Public Landing Page

1. There is now a choice between Desktop and mobile view when printing the public Class Schedule.

**Version 2025.2.1**

Admin Portal - Print Leader Reports

1. Performance improvement creating leader reports
2. You may now print or email leader reports from the admin portal

**Version 2025.1.31**

Member Portal - Leader Reports

1. Leader reports requested by leaders/clerks are now queued for immediate processing.

Correspondence Hub - Queue Leader Reports

1. Leader reports requested by leaders/clerks are now queued for immediate processing.

**Version 2025.1.28**

Background Processing

1. Migration of all background processing to a new Windows server is now complete.
2. Implemented Microsoft durable functions to "fire & forget".

Communication

1. All queued documents are now processed via background processing.
2. The default is that queued documents will be processed immediately.
3. Processing can be delayed by entering the number of hours to delay.

**Version 2025.1.25**

Enrol Participants

1. A system error is no longer generated if an attempt is made to add a member to a course in which they are already enrolled.
2. A system error is no longer generated if the class time list is double-clicked.

Add/Edit Participants

1. An issue with adding/changing/deleting email addresses has been corrected.

Login & Role Assignment

1. The software no longer attempts to create a login for an email with space(s) prepended or appended when **Populate Logins** is executed.

**Version 2025.1.16**

Login & Role Assignment

1. Added the email address as a read only field when changing passwords.
2. Added show/hide toggle to the password field
3. Added the ability to test a password from the grid.

Home Page

1. Added **Attrition** tab to the home page. This page provides some analysis of those members, financial last year but have yet to renew in the current year.

**Version 2025.1.11**

Add/Edit Courses

1. The Year component now contains a drop down button to select any year defined within the system.

Add/Edit Receipts

1. The Year component now contains a drop down button to select any year defined within the system.

**Version 2025.1.9**

Login & Role Assignment

1. Implement new field, *Last Login*. This field is updated whenever a user logs in.

**Version 2025.1.8**

Portal (Admin)

The Admin Portal has been revised with an emphasis on providing operators without full administrative privilege, the tools required to assist in solving common participant problems such as resolving online (Eway) payment issues and providing assistance for those having problems logging in.

1. Interface to summary is now via a tabbed UI. This provides a cleaner interface and more vertical space for data.
2. The *Received* grid now includes a toolbar with the ability to select a From and To date range.
3. The *Add/Edit Member* grid now includes a standard grid toolbar.
4. A new tab titled, *Online Payment Status* provides the ability to review the status of online payments and the ability to resubmit payments to Eway if necessary. This grid provides the same functionality as the [Review Online Payment Status](#Review_Online_Payment_StatusA7147A02) module.
5. A new tab titled, *Review Logins* provides similar functionality as [Login & Role Assignment](#Login_Security__Role_Assignmen00B206AC) except for the following...
   1. Only login records for logins without roles are displayed.
   2. bulk operations such as *Create Domain Login, Populate Logins, Set Email Confirmed* and *Reset Password* have been removed.

**Version 2025.1.6**

Member Portal

1. Improved the welcome experience for new members. If a new member, the software will proceed directly to the Member Details form rather than displaying the menu.

System

1. A toast message is now displayed when a grid is restored from a saved state,

**Version 2025.1.2**

Enroll Participants

1. Revised the grid column, *Other Class* to display the day and start time of class if a participant is waitlisted in the selected class but enrolled in another class for the same course.

Reports

1. Revised the *Enrollment Report* to print the day and start time of class if a participant is waitlisted in the printing class but enrolled in another class for the same course.

**Version 2025.1.1**

Reports

1. Added new report, *Unsuccessful Requests List*. This is a report of members who have requested enrollment in one or more classes but are waitlisted in all. In other words, all their enrollment requests have thus far been unsuccessful.

Add/Edit Courses

1. A new column, *1 per Student* is now displayed on the grid. It will be checked if a course with multiple classes is restricted to one class per student.

Enroll Participants

1. A new column, *Other Class* is now displayed on the grid if the course participation type is *Different participants in each class*. The column will be ticked if...
   1. the participant is waitlisted in the current class, and
   2. The participant is enrolled in another class in that course.

# 2024 Version History

**Version 2024.12.30**

Themes & Settings

1. You can now choose the image to be displayed at the bottom of the sidebar menu. The default is to display a random image.

**Version 2024.12.29**

Add/Edit Courses

1. Your may now define a course as a *featured course*. Featured courses should be kept to a minimum and reviewed regularly. Otherwise, their impact is reduced.

**Version 2024.12.24**

Home Page

1. Added a *Participation* tab that displays member enrollment requests as a Sankey (hourglass) diagram.
2. Added a splitter bar between the chart and the grid on those tabs that display both a chart and a grid.
3. Refresh each chart's data when the tab is clicked. Removed the *Load Data* button.

Add / Edit Participants

1. Added new column, *Birth Month* to display the month of birth for members with a birth date.
2. Added new tab to display birthdays in the current month.

Version 2024.12.20

Add/Edit Contacts

1. Fixed an issue that caused tags to be hidden on the grid.
2. Display ICE details by default on the grid.

Add/Edit Volunteers

1. Allow contacts to be volunteers
2. Include contact & ICE details on the grid.

Version 2024.12.15

System

1. Updated DevExpress components to version 24.2.3
2. The default font size has changed from *Medium* to *Small* in the administrative portal. This may be changed via the *Settings* menu option. The font size for the Member Portal remains at *Medium*.
3. The accessibility widget has been removed from the system. The preferred way to change font size is now via the *Settings* menu option. Font size can also be changed within the browser and/or operating system settings.

Version 2024.12.13

Member Portal

1. The software will now place the Member Portal into [*maintenance mode*](#What_is_Member_Portal_MaintenaE6D25AF1) if there is no enrollment period currently defined.

Version 2024.12.12

Class Schedule

1. The allocation of a **Once Only** class to a term has been redefined...
   1. If the class start date falls between the term start and end dates then the class is allocated to that term.
   2. If the class start date falls before the term start date and the term number is 1 thru 3, then the class is allocated to that term.
   3. Else, the class start date is later the the term 4 end date. In this case the class is allocated to term 4.
2. The class schedule will now continue to list **Once Only** courses that start after the close of term 4. Enrollment requests will continue to be registered as term 4 requests.

Add/Edit Courses

1. To facilitate the change to the Class Schedule above, class start dates are now restricted to the current year only. That is, 1st January thru to the 31st December in the current year.

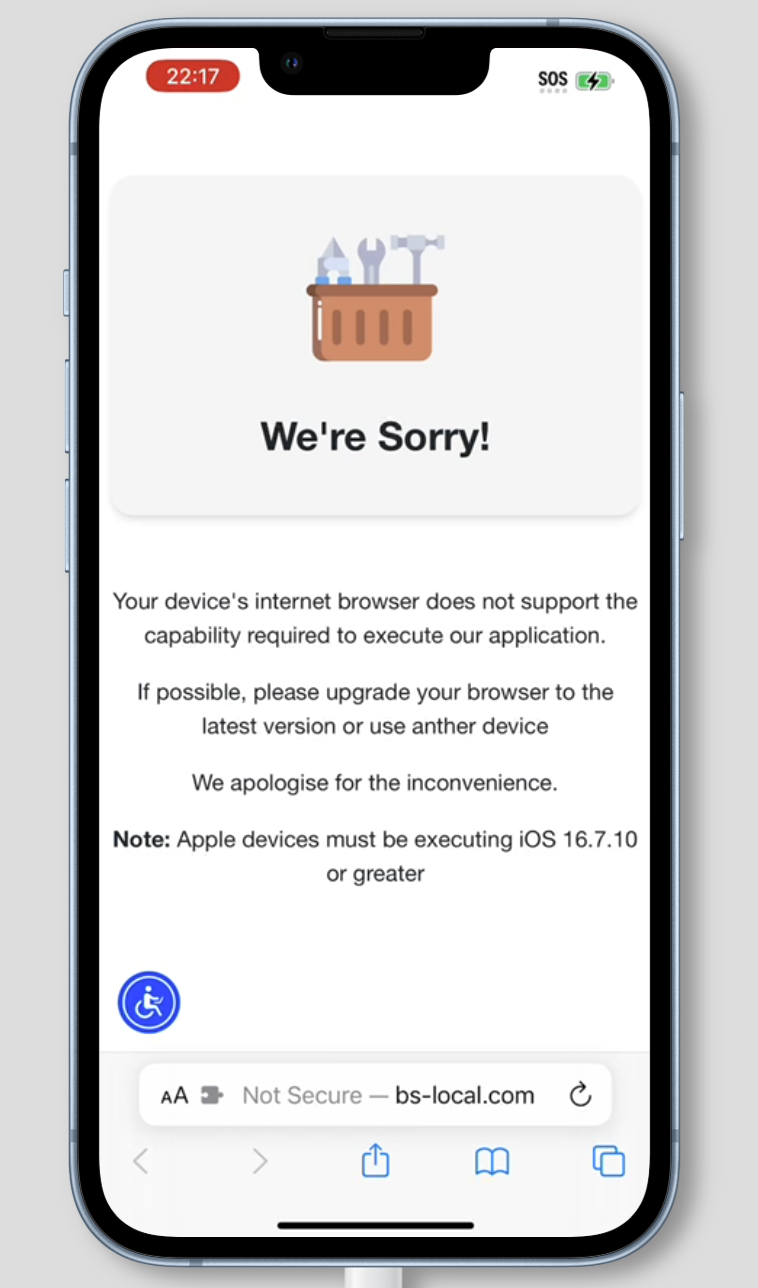
Bring Forward Courses

1. One year will be added to a class start date if that date is non-null when brought forward. While it is recognised that the brought forward date will rarely be correct, it ensures the start date is within the new year.

Version 2024.12.5

System

1. The software now detects a failed transition from static to interactive mode. If detected, an error page as below will be displayed..



Verson 2024.11.17

System

1. Upgraded all projects to Microsoft.NET 9 development platform.

Portal (Admin)

1. Recreated the tabstrip menu as a toolbar to allow for future options to be added.
2. All attendance menu options are now within a drop-down button titled *Attendance*.
3. A new menu option titled, *Calendar* has been added to the menu. When clicked, this will invoke the calendar within a sidebar.
4. Minor UI refresh to main screen and siblings.

Version 2024.11.1

Contacts

1. Contacts enrolled in courses that include fees will now be charged those fees.

Add/Edit Receipts

1. You may now process a receipt for a Contact.

Add/Edit Fees

1. You may now process a fee for a Contact.

Bank Data import

1. You may now assign an imported payment to a Contact.

Version 2024.10.28

Add/Edit Contacts

1. A new module added to the *Participation* menu

Version 2024.10.3

HTML Editor

1. The HTML Editor used to enter course descriptions now has the image resize feature disabled. Images must be physically resized before upload into the editor using image editor software such as Microsoft Paint. Care must be taken to keep image size to an absolute minimum. Image size greater than 20KB should be considered excessive. The use of glyphs such as those from <https://www.pngrepo.com/> is encouraged.

Version 2024.9.31

Enrol Participants

1. A message is now displayed when an attempt is made to select a new menu option when the grid has unsaved entries. Previously, this was generating an error.

Version 2024.9.30

Password Strength

1. To conform with the US National Institute of Standards & Technology (NIST) recommendations, password strength has changed. The requirements are now...
   1. A password must be a minimum of 10 characters
   2. A password must have a minimum of 6 unique characters, and
   3. A password must not be common

Note that the requirements for special characters, numbers and character casing in the password have been removed. Passwords do not have an expiry date. To satisfy option 3, proposed passwords are now checked against a list of 100,000 common passwords.

This change has no affect on current passwords in the system. Checks are only performed when an attempt is made to change a password.

Grid Layout

1. The *Choose* button on some grid toolbars has now been replaced with a *Layout* button. This button provides the ability to not only choose those fields to be displayed on the grid, but also *Save* the layout and *Reset* the default layout. This option is currently enabled in [Add/Edit Courses](#Add_Edit_Courses603B9451) and [Add/Edit Participants](#Add_Edit_Participants5E221E07).

Message Box

1. The software now has the ability to provide the option, *Don't Show Again* when displaying a message box. If ticked, the software will no longer display that message. This option will be progressively rolled out for repetitive messages that once read and understood do not need to be displayed again. Its first implementation is the *Change to Class Schedule* message displayed in [Add/Edit Courses](#Add_Edit_Courses603B9451) when class details are changed.

Version 2024.9.25

System

1. DevExpress version 24.1.6 maintenance update.

Version 2024.9.19

Bring Forward Enrolments

1. If a dropout record exists for the member in the class for the new term, previous term enrolments will no longer be brought forward. This accounts for the edge case of an enrolment being brought forward, manually deleted and then automatically or manually brought forward again.
2. If it is detected that the number of enrolments exceed the course's maximum enrolments the brought forward, enrolment will be waitlisted irrespective of its status in the previous term. This accounts for the edge case where enrolments have been manually created for a class prior to enrolments being brought forward.

Version 2024.9.15

Add/Edit Participants

1. Changing the email address will now automatically update the member's login credentials. There is no need to *Populate Logins* in Login & Role assignment.

**Note**: the recommended method of changing an email address is via *Manage Credentials* in the Member Portal. Changing an email address in *Add/Edit Participants* is provided as a convenience method to assist if the member is not receiving their confirmation email as expected. As such it should be considered as a measure of last resort.

Version 2024.9.9

Member Portal - Manage Enrolments

1. An issue that caused an incorrect enrolment count for the guest U3A view of a multi-campus course has been corrected.

Version 2024.9.8

Add / Edit Courses

1. Corrected issues when adding a new course and moving between tabs.

Version 2024.9.7

Member Portal - Class Sign In / Out

1. Corrected an issue preventing student sign in / out.

Communication module

1. Corrected form resize issue when attaching files.

Version 2024.8.28

Record Attendance

1. A small refresh of the module's User Interface has been done to reduce the height of the panels on the right hand side as they were causing issues with display on smaller devices.

Enrol Participants

1. Similar UI interface refresh as above to maintain consistency between the modules.

Version 2024.8.25

Bank Data Import

1. The bank data import procedure now supports Quicken (QIF) formatted files. Always choose the Australian version of the QIF file If given a choice of files by your banking software.

Version 2024.8.23

Help System

1. re-styled help button.

HTML Editor

1. Improved the handling of hard paragraph breaks.

Version 2024.8.22

Bank Data Import

1. Corrected malformed OFX files by replacing & with &amp; as per XML specification.

Version 2024.8.12

Add/Edit Terms

1. Added the **Create/Edit New Year** to easily create a set of term records for the new year.
2. The grid is now grouped by year.

Version 2024.8.7

Admin Website Menu

1. You can now right-click on most menu options and open the module in a new browser tab / window. You cannot right-click on the *Admin Portal* option as this may cause issues with Eway payments.
2. When opened in a new browser tab / window, the following menu options are disabled...
   1. Themes & Settings
   2. Manage Credentials
   3. Logout

Communicate dialogue

1. The system will now warn if the *Process Email* button is clicked and the email text is blank.
2. The user interface has been refreshed.

Version 2024.8.1

Admin Member Portal

1. Add the *Class Calendar* view to the Admin Member Portal. To view the calendar, click the Calendar icon on the top right hand corner of the screen.

Version 2024.7.29

Request Course Enrolments / Class Schedule Report

1. Multiple classes in a course are now listed correctly when the Participation Type is *Same Participants in all Classes.*

Version 2024.7.23

DevExpress Version 24.1.4 refresh

1. Scrolling through a report using the arrow keys no longer causes an error.
2. Minor user interface tweaks.

Class Attendance

1. You can now add an additional class by clicking the plus (+) button on the **Class Date** editor. Although intended to allow attendance recording for unscheduled classes, this option may also be used to record attendance for any other ad hoc class. Note that you cannot add a future new class. It must be in the past.

Version 2024.7.22

Add/Edit Course Types

1. Added the field **Short Name** to the table. A short name has a maximum of 15 characters. The short name is used on system graphics where screen space is at a premium.

Version 2024.7.21

Class Schedule

1. Improved unscheduled class handling. Unscheduled classes are now separately categorised rather than assigned an arbitrary day.

Version 2024.7.15

Public page

1. Reposition Calendar

Version 2024.7.12

System

1. Added the UserWay accessibility widget to the software. Use this widget to access display accessibility options within the software.

Version 2024.7.11

Add/Edit Courses

1. A new **Class View** tab providing a read-only view of courses and their classes.

Version 2024.7.7

Member Fee Calculation

1. An issue that caused fees to include amount incurred from previous years has been corrected. This issue affected leader's fees only. Fees for other participants were not affected.

Member Portal - Enrolment Requests

1. Course and per Term fees are now displayed in a prominent position with a highlight colour.

Version 2024.7.5

Leader reports

1. Corrected an issue with one-off activities occurring intra-term being reported for new term with incorrect enrolments.

Version 2024.7.4

Organisational Details

1. The field, *UTCOffset* has been replaced with *Timezone*. All U3A databases have been configured with the default Timezone of **Australia/Sydney**. This value is only used when performing background tasks. The timezone used by the website application is retrieved from the user's device.

Administrative website

1. The system now displays a reminder message when entering and / or during special events. Currently there are two such events...
   1. During the 8 days prior to random allocation, a message will be displayed reminding that allocation will occur in x days.
   2. During the enrolment email blackout period, a message will be displayed when the blackout will end.

Version 2024.7.2

Help Document: Add/Edit Courses

1. Added note to class Recurrence field to advise that classes with a non-null recurrence value should also have a non-null Start Date. Refer [Add/Edit Courses](#Add_Edit_Courses603B9451).

Version 2024.6.28

Member Portal - What's on today

1. An issue that caused this module to fail has been corrected.

Version 2024.6.26

Add/Edit Courses

1. Added HTML description editor.

Version 2024.6.22

DevExpress 24.1 Upgrade

Our Developer Express component software has been upgraded to 24.1.3. Any screen corruption issue will be corrected by refreshing the browser; SHIFT-F5 (Windows) CMD-F5 (Mac).

Version 2024.6.16

Add/Edit Terms

Change to business rules for terms...

1. The enrolment dates for terms may not overlap with enrolment dates for the previous or next term as it will make the enrolment period ambiguous.
2. The system will warn if there is a break in enrolment periods. A break results in non-continuous enrolment periods in which members are not permitted to enrol.

Version 2024.6.19

Random Allocation Blackout Period

The three day grace period between performing random allocation and emailing enrolment notices has now been extended to a full blackout. This means that as well as email being delayed, all automatic enrolment will not be performed in this period.

In addition, any enrolment request processed via the Member Portal or the Enrol Participants procedure will not have automatic enrolment until after the blackout period.

Minor User Interface Changes

There have been many minor UI changes to address display issues introduced by recent updates to Microsoft .NET component software. These include to..

1. Add/Edit Courses
2. Enrol Participants
3. Class Attendance

Class Schedule calculation

The class schedule calculation service has had a minor modification to address an issue that causes an intra-term class to be omitted from the schedule if in the new term's enrolment period.

Version 2024.6.16

System

1. A new option, **Themes & Settings | Reset Factory Settings** has been added to the main menu. This option will clear all customisations stored on your local device by the software. This includes but is not limited to your workstation ID, theme, dismissed message status and top/side menu selection.
2. You may now dismiss a system message when the button titled *Do not show again* is displayed. Clicking this button will permanently delete the message providing more display area for expandable controls such as the grid.

Add/Edit Courses

1. The Class Schedule User Interface has changed to prevent errors when attempting to perform asynchronous operations. Term selection has been removed from the Preview form and placed on the toolbar menu.

Member Portal - Member Enrolment

1. To prevent the accidental selection of courses, you must now click the **Click to select** or **Click to withdraw** buttons rather than clicking anywhere within the course.
2. This change is documented in a dismiss-able **What's New** section on the enrolments menu.

Version 2024.6.13

Multi-Campus Extension - Business Rule change

The allocation of Waitlist to Enrolled enrolment requests for the host U3A occurs one day prior to a course being opened for multi-campus enrolments. Once opened, multi-campus enrolment requests are processed on a "first in, wins" basis. The Host U3A will be processed first, followed by any visitor U3A enrolment requests.

Thus, host U3A members will have priority over visitor U3A members prior to multi-campus open and in each allocation run.

Version 2024.6.5

Member Portal

1. A new menu option, **Print your member badge** now allows a member to print their member badge if their device has access to a printer.
2. The leader's menu option, **Email / SMS Students** has been changed to **Email or SMS Students | Member Badges**. It now allows you to also print member badges for a selected range of students.

Version 2024.5.28

Member Badge Report

The system now includes the ability to print a Member Badge. You can find it at **Reports | Participation Reports | Member Badges**. When printed via this menu option you will be able to

1. Print for members joined after a given date,
2. Print for selected members, or
3. Print for all members.

It is also available as a leader report and can be found in...

1. Participation | Correspondence Hub | Queue Leader Reports
2. Portal (Admin) | Leader Reports
3. Member Portal | Your leadership role | Leader Reports

When printed as a leader report, Member Badges will print for those members enrolled in the course.

Version 2024.5.16

Add/Edit Courses

1. A tab strip above the grid has been added with the following tabs...
   1. All Courses. The default tab which will display all courses for the current year.
   2. Current. All courses for the current and future terms will be displayed.
   3. Complete. Those courses completed in previous terms will be displayed.
   4. Activity/Events. Current courses with an Occurrence type of *Once Only*.

Version 2024.5.15

Member Portal

1. A member's classes for today (My Schedule) is no longer automatically displayed. Rather a button is provided that when clicked will display the data. This change was made to improve performance and reduce screen flicker.
2. An issue in **Cancel Class** that caused the message, "There are no classes in the current term to cancel." to be displayed has been corrected.

Version 2024.5.13

Bank Data Import

1. An issue that prevented a member's Financial To details being updated when they were part paid for the year has been corrected.

Version 2024.10

System

1. The generic web browser right-click context menu has been disabled.
2. The generic web browser drag to select has been disabled. Drag to select within editors is still available.

Version 2024.5.6

Add/Edit Courses

1. Previously, when a class start time or day was changed, the system would change all attendance records to match the new date & time. This has been changed such that any change to a schedule parameter value will cause **future** attendance records to be deleted and recreated with the new schedule values. Existing records prior to the current system date will remain intact and without change. The schedule parameter values that will trigger this behaviour are...
   1. Term offered
   2. Start Date
   3. Recurrence
   4. Occurrence
   5. On Day
   6. Start Time

This change will preserve existing attendance records while allowing change to future records. The only time that this may cause issue is where leaders/clerks record attendance into future classes. This is not recommended.

Student leave & cancelled class records will not be changed.

Version 2024.5.5

Add/Edit Courses

Previously, you could not change the *Course Participation Type* if a course had enrolments. This restriction is now relaxed...

1. If the course has only one class, no warning is generated. The system performs the change without further ado.
2. If you change from **Different participants in each class** to **Same participants in each class** no warning message is generated. The system will move the class enrolments to course enrolments deleting any duplicate students.
3. If you change from **Same participants in each class** to **Different participants in each class** a message will be generated warning you that the system will move the course enrolments to the first class in the course. It is up to you to then transfer students from that class to other classes, if required. This can be done via [Enrol Participants](#Enrol_Participants6C90983F).

Class Attendance

1. A new button titled **Reset Selection** has been added to the *Quick Rollcall* editor group. This option resets the selected records to **Absent without apology** by first deleting the record and then re-creating it. It is especially useful to remove duplicate records if they occur. For details, refer [Class Attendance](#Class_Attendance0099DC9E).

Version 2024.5.2

System

1. Soft delete is now enable for the Course, Class, Enrolment, Person & Receipt tables.

Admin | Restore Deleted Items | Restore Deleted Courses

1. A new menu item that allows you to restore deleted courses. Simply select the required courses from the list and click the **Restore Courses** button. The courses, its classes and enrolments will be restored.

Admin | Restore Deleted Items | Restore Deleted Participants

1. A new menu item that allows you to restore deleted participants. Simply select the required courses from the list and click the **Restore Participants** button. The participant, their enrolments and acsh receipts will be restored.

Class Schedule Cache

1. An issue that prevented student enrolments in future term classes has been corrected.

Version 2024.28

Attend Class

1. An issue that caused the class date list to be empty when a class occurs on the last day of term has been corrected.

Bank Data Import

1. You can now split a selected row into two. On split, the amount paid will be divided equally between the two records.
2. You can now delete a row.
3. The member, amount and financial to fields are now editable.

Please refer to [Bank Data Import](#Bank_Data_ImportBD8D2607) for a full description of the updated content.

Version 2024.22

Organisation Details

1. Options relating to the Class Schedule report and enrolment selection are now grouped together on the *Operations* tab.
2. A new option titled, *Report For the Period* Is available within this group. It allows you to select the reporting period for the Class Schedule...
   1. **Full Year**. The report is printed for the current term through to the end of the year.
   2. **Current Semester**. The report is printed for the current term through to the end of the current semester.
   3. **Current Term**. The report is printed for the current term only.
3. The field, *Print leader on public report?* is now fully documented in [Organisation Details](#Organistaion_DetailsFE7141D5).

Grid Toolbar (all procedures)

1. The *Group rows...* toolbar button is now displayed only when one or more columns are grouped on the grid.

View Multi-Campus Offers

This new procedure lists the current classes offered by other U3A to your members. It is available from the **Course** menu column.

Member Portal

1. Corrected issues reinstating a member after they have been permanently deleted.

Version 2024.17

Introducing Multi-Campus Extensions

Multi-Campus Extensions is a major new feature for for the system. It will allow your U3A to accept courses offered by other U3A groups (campuses), and will allow your U3A the ability to offer courses to other campuses.

Using the extension is completely optional.

**To enable Multi-Campus Extensions...**

1. Go to Admin | Organisational Details and select the *Multi-Campus* tab.
2. Tick the *Allow Multi-Campus Extensions* checkbox.
3. Move the U3A groups from which you wish to accept courses from *Not Allowed* to *Allowed*.

That's it! Courses offered by other U3A will now appear in your *Class Schedule*. Your members may request enrolment and will or will not be accepted by the offering U3A.

**To offer courses to other U3A...**

1. Go to Course | Add/Edit Courses
2. Select the course you wish to offer to other U3A
3. Click the *Settings* tab
4. Enter a date into the field, *Allow Multi-Campus Enrolment From*. Multi-Campus enrolments will be allowed from that date.

Currently, there are restrictions on which courses may be offered to other U3A Groups. These are...

1. the **Allow Multi-Campus Extensions** checkbox in [Organistaion Details](#Organistaion_DetailsFE7141D5) is ticked,
2. The course has no fees,
3. The course participation type is *Same participants in all classes*,
4. There is only one class in the course, and
5. The course is offered in one term only.

As such, it is anticipated that most multi-campus courses will be once-only activities such as Guest Speakers.

Version 2024.3.16

Portal (Admin)

1. Paging has been removed from the *Attendance Analysis* pivot-grid and replaced with scroll bars.

Version 2024.3.5

Enrolment Reports

1. Previously, if a course in term had enrolments and the term was then unchecked on the class record, the enrolments would continue to be listed on the various enrolment reports. This has now been corrected. Only courses with the term number checked will be listed on enrolment reports for that term.

Add/Edit Terms

1. Performance improvement displaying the timeline.

Version 2024.3.4

Class Schedule cache

A **cache** is a software component that stores data so that future requests for that data can be served faster. It is built once and then used multiple times without refreshing the data from the database. A cache can improve performance significantly but with the trade-off that the data may become "stale" or out-of-date.

The u3admin system now employs a cache to store the details reported on the Class Schedule Report and the Member Portal - Member Enrolment procedures. The cache is rebuilt every hour so at most, the data is one hour out of date. However, the Enrolled & Waitlist numbers are always up-to-date.

The cache can also be rebuilt manually if needs be. In most cases however, this will not be unnecessary.

Member Portal - Member Enrolment

1. This module now uses the new Class Schedule cache.

Class Schedule Report

1. The public version of this report now uses the new Class Schedule cache.

Add/Edit Courses

1. The button, **Rebuild Cache** has been added to the toolbar. When clicked, this will refresh the cache manually.

Version 2024.3.29

Member Portal - Online Payments

1. Payments cancelled by the operator are now reported as a Cancelled Transaction. Previously, they were reported as O6 Error.

Version 2024.3.28

Review online payment status

1. You may now select a date range to display. The default range is for the last 14 days.
2. Documentation review.

Add / Edit Enrolments & Member Portal - Withdraw from course enrolments

1. When an enrolment is deleted, all enrolments for the class in future terms and all attendance records for future dates are also deleted.

Version 2024.3.17

System

1. DevExpress components updated to version 23.2.5

Organisation Details

1. Allow email address to be null.

Home Page

1. Age of membership graphic

Member Portal

1. Removed *Tell a Friend* menu option.

Version 2024.3.15

Organisation Details

1. Added *Data Retention* group to the *Operations* tab.

Version 2024.3.13

Add/Edit Receipts

1. An issue that caused an error when deleting a receipt immediately after editing it has been resolved.

Member Portal - My leadership role

1. Only those classes for which a participant is a leader or a clerk will be displayed and available for selection by leaders/clerks. Although the logic will apply to all classes, this change has most relevance when a course...
   1. has multiple classes, and
   2. there are different participants in each class, and
   3. each class has different leaders and clerks.

Version 2024.3.11

Member Portal - Online Payment

Online payment processing has been revised for payments with a result code of 06 - Error. This result can occur as the result of delayed processing by either the member's financial institution or the card provider. As such, the error is not recorded until 24 hours after the payment attempt. Attempting to view a member's financial status in the portal will cause the software to re-interrogate Eway for an updated payment result. If the result remains in error within the 24 hour period, the following message will be displayed...

The processing of your payment is incomplete.

This may be due to a delay in processing by your bank.

Don't worry as we'll keep trying. Please review later, and

if the problem persists, contact your U3A.

Review Online Payment Status

1. A **Re-Submit** button is now available on the toolbar. If clicked, the system will re-interrogate the EWAY system for the status of the selected payment. If the status is successful and a cash receipt transaction does not exist that cash receipt will be created. Note that this button is only enabled when the *Status* field is blank (Not Processed).
2. A **Full Msg** button has been added to the toolbar. When clicked, a full message explaining the payment result will be displayed.
3. The *Result Code* is now displayed with a brief description as to its meaning.
4. This procedure has been moved up in the menu hierarchy to indicate its relative importance when researching a failed online payment issue.

Add/Edit Courses

1. Added the *Off-Schedule Activity* check box. When ticked, this field will prevent the course & its classes from being displayed on the Class Schedule report and will not allow enrolment via the Member Portal.

Version 2024.3.7

Correspondence Hub

1. Improved messaging when attempting the reactivate a spam complaint email suppression, including the ability to contact Postmark directly.
2. You can now reactivate an email suppression from the Statistics/Bounces page, bounce details pop-up form.

Version 2024.3.6

Add/Edit Courses

1. Added **Enforce One Class Per Student** checkbox to the detail course form. Note this this field is only enabled when the *Participation Type* is set to **Different participants in each class**. The field affects software behaviour in *Auto-Enrolment* by ensuring that any enrolment in a course remains waitlisted if the student is already enrolled in a class for that course. By default, this field is checked for new courses. If required, it must be manually checked for existing courses.

Version 2024.3.5

Member Portal | View Enrolments

1. An issue that caused Courses with *Different participants in each class* not to be displayed has been corrected.

Home Page | Cash Receipt, New Member & Enrolment Graphs

1. The above graphs now have the ability to include breaks in the y-axis. The intention is to recognise that these graphs display a wide range of values depending on the month of the year. Using a break compresses the y-axis, emphasising the smaller values. Note that you can only define the **maximum** number of breaks. The software will determine whether or not an additional break can be inserted without losing data.

Attendance Analysis

1. You can now select the report for Year and filter by Course Type.

Report Viewer

1. The report viewer's toolbar now has a *Close Report* (door icon) on the far right. Clicking this button will return you to the parent form which the report was executed. Mostly, this will be the system's *Home* page with the following exceptions...
   1. **Correspondence Hub | Queued Transactional Email**. Exit from Preview will return to the email transactions page.
   2. **Portal (Admin) | Leader Report**. Exit from *Print Report* will return to the class selection list, and
   3. **Communication**. Exit from *Mail Merge* will return to the document editing form.

Correspondence Hub | Email Search

1. The search results list now includes the email stream (transaction or broadcast).

Version 2024.3.1

Participant Enrolment PDF

1. The Participant Enrolment PDF emailed to members now includes the term start & end date and the duration in weeks.

Version 2024.2.29

Attendance Analysis Chart

1. Chart x-axis interval is now correctly set to one week. Previously it was set to one day causing spurious results for small datasets.

Leader Reports

1. Leader reports *requested by a leader/clerk* are now sent within the hour. System generated leader reports continue to be sent overnight.
2. The Leader Report now prints **\*New\*** when a student has been enrolled in the last 7 days.

Version 2024.2.27

Class Schedule Report / Member Portal - Manage Enrolment

1. Small performance improvement calculating class counts.
2. An issue that caused some future classes not to display on the class schedule has been corrected.

Member Portal - Course Enrolment

1. All new enrolment requests are now marked **Waitlisted: (Pending Allocation)** until allocation is performed. As discussed at the recent debrief meeting, this has been done to prevent members from jumping the queue.
2. Allocation will be performed within the hour of the enrolment request being received. This is a background process and requires no intervention. The process runs between 5am and 11pm only so as not to interfere with the primary overnight process which currently runs at 4 am.
3. The random enrolment allocation procedure will continue to run overnight only.
4. Enrolment email will be sent hourly, *for enrolment reports only.*

Record Attendance

1. An issue when applying leave has been corrected.

Communication Hub - Search

1. Corrected Date Received UTC issue
2. An issue that caused the From and To date ranges to default to 1st Jan 0000 has been corrected.

Version 2024.2.24

System

Page refresh & display issues corrected...

1. Page refresh (F5 or CTRL-F5) now refreshes to the page currently displayed rather than the home page.
2. Right-click a menu item now opens that menu item's page rather than the home page.
3. Class QR scanning is now working as expected.

**Known Issues**

* Logging out in multiple tabs opened via the right-click method in 2 above will result in an error on all pages but one. Close all tabs but one and then logout.

Communications procedure

1. Layout changes to maximise available screen space.

Communications hub - Search

1. Click on mail items displayed in a search will now retrieve the email text as stored on Postmark's server.

Member Portal - Member Enrolment

1. (user request) The highlight for classes in future terms has been changed to *Enrol for ...* rather than *Offered*.

Add/Edit Participants

1. (user request) The *Participants* tab no longer includes new members not financial.
2. The active tab is now set to *Participants* and the grid filter recalculated when the toolbar filter is closed.
3. Revised documentation to explain filtering behaviour.

Version 2024.2.20

Class Schedule

1. An issue that prevented class counts to be zero for future terms has been corrected.

Version 2024.2.19

All PDF reports

1. PDF reports are now displayed in the standard DevExpress report viewer. This provides consistency for all reports and corrects display issues on Android tablets. PDF reports are generated in...
   1. Preview transactional email in Communications Hub,
   2. Leader reports display in the administration member portal, and
   3. mail-merge preview within the Communications dialogue.

Communications dialogue

1. The page layout of the Communications dialogue has been rearranged. The parameter selection is now to the left of the word editor rather than on top. This provides a better uses of available screen space on laptop and tablet displays.

Course Leader's Report

1. Status of Waitlisted is no longer word-wrapped.

All Leader's Reports

1. A page break now occurs between pages when a course has multiple classes and there are different participants in each class.

Version 2024.2.18

Member Portal - Request Course Enrolments

1. The enrolment status (enrolled, waitlisted, pending etc) is now updated on the selection list immediately an enrolment request is saved.
2. Selection filters are no longer cleared when an enrolment request is saved. This results in the requested class remaining visible on the display after it is saved.

Version 2024.2.17

Member Portal - Request Course Enrolments

1. An issue that caused classes in future terms to be omitted from the selection list has been corrected.
2. An issue that prevented enrolments in future terms from deletion has been corrected.
3. An issue that caused enrolments in future terms to be automatically enrolled rather than waitlisted has been corrected.

Version 2024.2.15

Enrolment Terms

The timeline is no longer automatically displayed to improve system performance. To display the timeline, click the *Show Timeline* button on the grid's toolbar.

Cancel Class

The *Cancel Class* procedure on the **Course** menu has been simplified by using tabs rather than grids side-by-side.

The first tab allows a cancellation to be added, edited or deleted.

The second tab displays all current cancellations and allows a cancellation to be edited or deleted.

Version 2024.2.14

Bank Data Import

An issue the caused the upload of OFX files to fail has been corrected.

Member Fee Calculation

An issue that caused the member fee calculation to include complimentary members in previous years as complimentary in the current year has been corrected. The issue manifested itself in the *Financial Status Enquiry*. It did not affect the calculation of fees due in the Member Portal.

Course Fees Due Enquiry

Corrected Full Screen display issue.

Version 2024.2.13

Version 3

Announcing the third major release of the U3Admin software. This version introduces major infrastructure changes made possible by the introduction of Microsoft.NET version 8 the major benefit of which is the elimination of many lines of code. In addition, our software now fully supports the many security improvements made possible by .NET 8 including protection from Cross-Site Request Forgery (CSRF).

There are also many user interface changes, including

Member Portal

1. New support link
2. New menu help topic
3. New enrolment request and withdrawal procedures

Administration Website

The emphasis in this release is to ensure an optimal experience when using smaller screen sizes or screens with 16:9 aspect ratios as are most modern laptops.

1. New, optional sidebar menu. Change to top menu via *Themes & Settings*.
2. New information cards when a menu group is clicked.
3. Options to expand grids to full screen
4. Where applicable, buttons have been moved to the grid toolbar so they they remain visible in full screen mode.
5. PDF reports are now embedded within the page rather than displayed in a separate window.

# 2023 Version History

version 2023.12

Add/Edit Receipts

1. Added the ability to set/reset the participant's *Financial Year*. Please refer to [Add/Edit Receipts](#Add_Edit_Receipts228A25EE) for details.

version 2023.12.16

System

1. Upgraded DevExpress components from version 23.1.6 to 23.2.3. The interesting changes thus far are...
   1. The grid toolbar now has an **Auto Fit** button which will resize grid columns to fit the column's contents when clicked.
   2. The filter drop down for a *Date* column now presents a treelist of all dates within the column. This allows selection of multiple dates and date ranges.
   3. The grids in *Add/Edit Receipts, Add/Edit Fees* and *Financial Status Enquiry* have totals without the generic Count and Sum titles.

Member Portal - Member Enrolment

1. The text *Waitlisted: (Awaiting Random Allocation)* will continue to be displayed until random allocation emails have been sent irrespective of the actual status of the enrolment.

version 2023.12.15

Auto-Enrolment Overnight Process

1. Email notification to members is now delayed until 3 days after the random allocation day.

Member Coordinator Email Overnight Process

1. The membership officer will receive reminder emails 5 days prior the random allocation day and each day until email notifications are sent to members.

Add/Edit Public Holidays

1. You can now import holidays for 2024.

version 2023.12.12

Member Portal - Member Enrolment

1. On non-mobile devices, there is now the option to display the course list in Detail, Summary or Brief format.
   1. **Detail** provides full course/class detail.
   2. **Summary** displays the course name and description with the class details (leader, location and time).
   3. **Brief** displays a one line description. It is akin to an index.

version 2023.12.10

Member Portal - Member Enrolment

1. Web links now opened in new browser tab rather than popup window to avoid CORS issues.

version 2023.12.9

Add/Edit Courses

1. A number of issues in calculating the term for once only and out of term classes have been corrected.
2. A class can now be assigned a **Unscheduled (Varies)** occurrence type. A class with this occurrence type will allow enrolment the same as any other but...
   1. It does not display on the *Course Schedule,* and
   2. You cannot record attendance for it.

version 2023.12.6

Member Portal - Member Enrolment

1. Revised processing logic for a course with *Same Participants in all classes* and with multiple classes. The course is only displayed in the enrolment once but each class is displayed in the *Class Details* section. This prevents a participant from enrolling in the same course multiple times by clicking on different classes.

Class Schedule

1. Similar to the above, a course with *Same Participants in all classes* and with multiple classes is only printed once.

Add/Edit Courses

1. Corrected an issue when cancelling a Detailed course with more than 5 class records.
2. A **Preview Enrolment List** button has been included. When clicked, the enrolment list as seen by members when requesting enrolments via the *Member Portal* will be displayed.

version 2023.12.5

Add/Edit Courses

1. Issues editing class details in Simplified / Activity form have been corrected.
2. A new field, **Additional Information URL** has been added. This allows you to enter a web page address that contains additional detail about the course.

Class Schedule

1. Report now includes a Table of Contents. The Table of Contents is interactive meaning each entry is a link that when clicked will navigate to the course description. To navigate back to the start of the document, use CTRL-Home.
2. Courses details now have an Additional Information link if available. This link is also interactive.

Member Portal - Member Enrolment

1. Courses details now display an Additional Information button if available.

version 2023.12.4

Public landing page

1. Display a lockout message if up to 12 hours prior to new year enrolment start. Prevent both new user registrations & member logins.
2. Display a lockout message if the current date is not within an enrolment period. Prevent new user registrations in this period.

Member Portal

1. Display an informational message if the current date is not within an enrolment period.

Member Portal - Member Details

1. Include a Help button on the email address field to explain how to change the email address via the *Manage Credentials* menu option.

Admin Portal - Eway Payments

1. A unique Workstation ID is now assigned to the Online Payment Status record. It is used to ensure payment requests created via the Admin Portal are only completed by the workstation that initiated the request, thus avoiding spurious D4406 response messages.
2. The test to deny access to online payments if not executing within the *U3A Desktop* application is now performed when clicking the *Pay By Secure Online Payment* button rather than *Your Membership Fees* button. This allows an administrative login to examine the details of fees owing while still denying access to online payment in an insecure environment.

version 2023.11.27

Cash Receipt

1. The receipt date of an Eway cash receipt is now recorded as local time rather than UTC. Receipts created as the result of a bank import continue to be recorded as the date on the import file.

version 2023.11.26

Review Online Payment Status

1. Help document written

Admin Portal

1. Significantly reduced to code path taken when the software returns from processing an Online Payment. The software now returns to the Admin Portal front page rather than traversing the front page, through to the Member Portal and then the Member Payment page. To review a payment made, simply look at the receipt summary grid.
2. The receipt summary grid is now displayed in descending date/time order so that the latest receipt is displayed at the top.
3. Additional columns have been added to the receipt summary, being time of creation and the new Financial To year.

version 2023.11.25

Review Online Payment Status

1. This is a new module found on the *Fees & Receipting* sub-menu within *Participation*. The purpose of this module is to be able to review EWAY status & error codes without the need to access the EWAY webiste. A payment request with a status code of "00" represents a successful payment. Any other code is an error. Result messages are also coded. To find the meaning of the message search Google for "eway xxxx" where xxxx is the message code. For example, "eway D6604" will return the error...

The customer’s card issuer has declined the transaction as there is a problem with the card number. The customer should contact their card issuer and/or use an alternate card.

version 2023.11.23

Complimentary Membership

1. Local rather than UTC time is now used to calculate the leaders list.

Member Portal - Your membership fees

1. The audit trail is now retained in the event of a declined online transaction.

version 2023.11.22

Member Portal - Your membership fees

1. An attempt to pay fees via EWAY when the member does not have an email address recorded no longer causes an error. Rather the payment is accepted and a postal Cash Receipt is generated for processing overnight.
2. The member's address and phone number has been removed from the EWAY transaction to reduce the possibly of spurious V\*\*\*\* error codes.

version 2023.11.21

Login Security & Role Assignment

1. Corrected an issue that caused multiple logins to be created when *Populate* *Logins* was executed multiple times.

Add/Edit Courses

1. Avoid error if user double clicks the Save button rather than single click.

Mailing Labels

1. Corrected O/sys compatibility issue that caused mailing labels to fail on the Linux server.

Admin Website Dashboard

1. Corrected graph start date from end of month to start of month.
2. Include financial members in next year as well as the current.

version 2023.11.20

Add/Edit Participants

1. Corrected an issue that caused a participant's Financial To to be set to 4047.

Enter/Exit Maintenance Mode

1. Date and time entered is now persistent.

version 2023.19

Bank Data Import

1. Reset member financial to year to the previous financial to year when process of a refund results in total fees paid being less than the current membership fee plus postal fee, if applicable.

version 2023.11.18

System

1. Reinstated English AU spelling dictionaries.

version 2023.11.17

System

1. Microsoft .Net 8 upgrade. This upgrade keeps our software in step with the latest Microsoft technologies. It contains no user interface changes.

Admin & Member Portal

1. An issue that prevented a member's *Financial To* year from being displayed correctly after fee payment has been corrected.

Member Enrolment Report

1. The confirmation report emailed to members now reports course fees, if applicable.

Add / Edit Courses

1. An issue that caused the Course grid display to flash when the Classes detail grid was activated has been corrected.

version 2023.11.16

Admin Portal

1. Participant maintenance grid now includes members not financial.
2. The receipts grid no longer wraps text in row cells. Cell width has also been adjusted.

version 2023.11.15

Overnight Procedures

1. The addition of the new course views has resulted in large numbers of courses being reported as modified simply because a view has been changed. The reporting of modified courses to the membership officer has therefore been temporarily been suspended until this is corrected..

Admin Portal

1. Reinstated *Refresh* button due to popular demand.

Admin Portal & Member Portal

1. Corrected an issue that prevented the selected linked member being displayed on the portal badge.
2. Corrected an issue that caused multiple members without email addresses to be linked.
3. Corrected an issue that incorrectly set the member's join date to the receipt date on payment of fees. A member's join date is now reset if the member's previous financial to year is greater than the new financial to year by more than one year on payment of fees. For example,

* Member financial in 2023, pays in 2024 then join date is unchanged.
* Member financial in 2022, pays in 2024 then join date is reset.

version 2023.11.14

Add/Edit Courses

1. *Add/Edit Courses* now has three course views selectable via tab buttons at the top of the edit form. The available views are; *Simple, Activity* and *Detail*. for a full discussion on this topic please refer to [Add/Edit Courses](#Add_Edit_Courses603B9451).
2. When creating a new course, a pop-up message will be displayed requesting the view to display the new record.

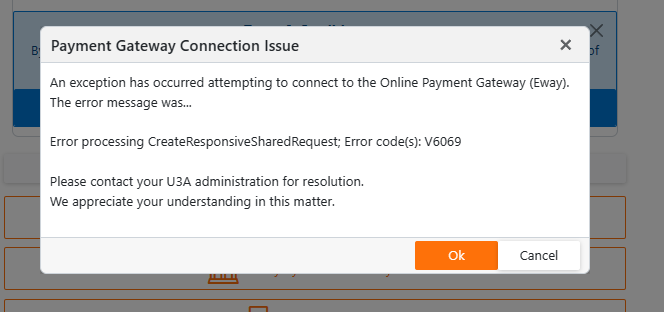
version 2023.11.11

Overnight processes - leader's report pack

1. The leader's report pack is now sent to leaders 2 days prior to the start of their course. For most leaders this will not cause any change as their courses start at the beginning of term. The change is intended for leaders with courses that have a start date during or after the term break.

Member Portal - Online Payments

1. The Eway payments system will reject payments with email addresses containing spaces at the beginning or end of the address. All email addresses are now trimmed of leading & trailing spaces prior to being forwarded to Eway.
2. Any error occurring from forwarding payment details to Eway will now result in a message similar to the following...



To ascertain the error description, go to [eWAY Validation Response Codes - V6058 to V6102](https://go.eway.io/s/article/eWAY-Validation-Response-Codes-V6058-to-V6102?language=en_US). Alternatively, Google "Eway <ErrorCode>". For example, Eway V6069.

All errors indicate an issue with the data presented to Eway and can be corrected by editing the member record. For example, V6069 is an invalid customer (member) email address. Correct as necessary and redo the online payment.

version 2023.11.8

Organisation Details

1. You may now enter additional email addresses to receive system warnings & other information generated overnight. Enter the addresses as one per line into the field, *System Postman CC email.*
2. Bank Details have now been split into their own group.

System Postman membership email

1. The email will not list all email suppressions for the last 7 days.

version 2023.11.4

Portal (Admin)

1. The *Refresh* button has been removed from the member selection editor. It's functionality has been incorporated into the *Clear* button. That is, clicking the *Clear* button will now refresh the receipt data and clear the member selection editor.

Member Portal - Fee Payment

1. Performance improvement transitioning from an EWAY online payment back to the Member Portal, reducing the possibility of double-clicking the **Finalise Transaction** button.
2. On return from the EWAY online payment, the Member Portal will display a wait spinner while the receipt creation procedure is processed as a background task.

version 2023.10.28

Member Portal - Fee Payment

1. An issue that could cause a double payment to occur if the Eway **Finalise Transaction** button was double-clicked has been corrected.

Member Portal - Enrolment

1. Course fees are now displayed on the class selection schedule, if applicable.

Class Schedule Report

1. Course Fees are now displayed on the report, if applicable.

version 2023.10.26

Correspondence Hub - Search

1. You can now search email for a given date range.

version 2023.10.17

Member Portal - Change your course enrolments

1. The *Offered In* field now includes the year of offer as well as the terms.

All Course Reports including *Class Schedule*

1. The *Offered In* field now includes the year of offer as well as the terms.

Including the year as well as terms in the *Offered In* field is quite redundant. However, it helps to emphasise exactly what the member is enrolling in.

Add/Edit Courses

1. The grid toolbar now contains a *Master/Detail* button where you can select to show/hide all Class detail rows.

Financial Status Enquiry

1. The *Term* selection is now restricted to those terms in the current membership year only.

Member Portal - My Leadership Role

1. The default term displayed is now the current term in which the current system date falls. If this is null then the current enrolment term is used.

version 2023.10.9

Member Portal - Member Enrolment

1. The enrolment selection page now contains a *Save* button. This allows a quick save, bypassing the selection review.
2. The software now differentiates between a Full class and a Closed class. A Closed class is one in which the *Auto Enrol?* field is unchecked in [Add/Edit Courses](#Add_Edit_Courses603B9451).

System - Message Box

1. The system message box will now display a scroll bar if the message height exceeds 75% of the viewable height. Currently, this will only occur when 20+ enrolments are added/removed from a member.

version 2023.10.3

Class Schedule Report

1. The Class Schedule report now has a QR (Quick Response) Code assigned to each class. Mouse-click the code in *Print Preview* to quickly enrol in that class. Scan the code in *Print Preview* or a printed report to also enrol in the class. A member will still need to log into the system but once a class is scanned/clicked they will be redirected to the *Change Your Course Enrolments* menu option and prompted to enrol in the selected class.

Add/Edit Courses

1. You can now copy a class link which when activated enrols you directly in that class. This change is intended to assist activities officers in advertising special events to members.

version 2023.9.29

Member Portal - View my enrolments

1. An issue that caused a maximum of 10 enrolments to be displayed has been corrected. There is now no limit to the number that can be displayed.

Enrol Participants

1. Performance improvement. The software no longer calculates fees due when the Fees Due column is not displayed. The Fees Due column is only displayed when the selected course has either a fee per term or a fee per year.

version 2023.9.27

Bank Data Import

1. If the bank description resolves to two or more participant records, a message to that affect is now displayed. Previously, the first participant in the list was selected.
2. The action button area now has a Hide/Show button. If hide is selected, the header area (file upload and action buttons) will be hidden from display and the grid expanded in height to fill the screen. Click the button again to re-display these items.

version 2023.9.25

Bank Data Import

1. Performance improvements when parsing file data.
2. We now recognise a participant by...
   1. Last name and first name in either order,
   2. Last and first initial in either order, and
   3. Last name only.
3. Camel case text is now correctly tokenised. Thus, FredSmith becomes two tokens, Fred and Smith.
4. We now require the receipt to match either the participant's total fees owing or an individual course/membership fee.
5. Where a participant is found but the fee does not match a warning is displayed.
6. A help page has been added.

Member Portal - My Leadership Role

1. Corrected an issue that prevented a leader/clerk viewing the leaders sub-menu in the Member Portal when their course is in a future term.

version 2023.9.20

Add/Edit Enrolments

1. An issues that caused program failure when switching between terms has been corrected.

Add/Edit Attendance

1. An issues that caused program failure when switching between terms has been corrected.

version 2023.9.19

Member Portal - Member Enrolments

1. Classes held on an inter-term date are now labelled and highlighted as being in the previous term.
2. The software now correctly accounts for a course with classes that extend into the inter-term period and is also to be held in the following term. This will occur when the number of class recurrences is greater than the number of weeks in a term. In this case the course will be listed twice, firstly for the classes held in the inter-term period and secondly for the classes to be held in the new term.
3. As a result of the above changes, a member can clearly view the course / term they are enrolling into. In the given scenario, they will no longer be automatically enrolled into the new term but rather the term they select.

version 2023.9.17

New member fee calculation

1. The fee calculation now uses the current enrolment term rather than the current term dates to calculate the fees due for a new joining member.

version 2023.9.15

Course by Leader Report

1. The *Course By Leaders* report now includes the option to print by course clerk rather than leader.

Reports menu column

1. The reports menu column now displays the *Home* page when clicked. This allows a different report to be selected when a report is currently displayed.

version 2023.9.14

Member Portal - My leadership role

1. Leaders with courses within the current year but in future terms are no longer denied access to the *My leadership role* menu item.

Attendance Reports

1. A new report, *Attendance Summary* provides a one page attendance snapshot for any selected year.

version 2023.9.12

Student enrolment email

1. The student enrolment email no longer prints the leader's contact phone/email if the leader has set their contact details silent.

Member Portal - Change your course enrolments

1. An issue that caused previous term enrolments to be deleted when a new enrolment was added has been corrected.

version 2023.9.9

1. DevExpress components have been updated to version 23.1.5. There are no UI changes.
2. There is a new attendance report, *Attendance By Participant Report*. It can be printed for one or more members, a given date range and attendance status of Present, Absent with apology or Absent without apology.
3. All reports now display a loading indicator panel on startup to let you know something's happening.

version 2023.9.5

U3A Landing Page

(the page that is displayed on the link from your website)

1. The incorrect alignment of the Register button for new members has been corrected. This issue manifested itself on medium to large resolution devices only.
2. The default theme has been changed to *Office White* to match all other site pages.
3. Your can now change the theme to more accurately reflect your website's colours. This is done via a query string in the web address. Currently there are four...
   1. <https://<YourU3AName>.u3admin.org.au?theme=office-white> .This is the default theme
   2. <https://<YourU3AName>.u3admin.org.au?theme=blazing-berry> .This is how the landing page used to look.
   3. <https://<YourU3AName>.u3admin.org.au?theme=blazing-dark> .A dark background theme
   4. <https://<YourU3AName>.u3admin.org.au?theme=purple> .A half-hearted attempt to mimic an Apple application.

Hopefully in future there will be improvements to the range of themes.

Login

1. The *Remember Me?* checkbox has been returned to its original position. It had been removed while reported issues with it were investigated. That investigation is now complete and all is well.

Member portal

1. Added new menu option, *Tell A Fried*. This provides a link to the U3Admin public website, <https://u3admin.org.au>.

Administration website home page

1. The new U3Admin public portal, <https://u3admin.org.au> link has been moved to the right in the tab sequence.

version 2023.8.28

Administration website home page

1. The first tab on the Home page now displays the new U3Admin public portal, <https://u3admin.org.au>. This is temporary and intended to generate a little traffic to the new site to improve it's SEO. Any comments about the new site would be appreciated.

version 2023.8.24

Attendance Analysis Report

1. You may now select the courses you wish to print on the analysis report.

Enter / Exit Maintenance Mode

1. A new procedure located on the **Course** menu column. This function will place the Member Portal into *Maintenance Mode* meaning members will be unable to access its functionality. To resume normal operation, re-enter this procedure and exit Maintenance Mode.

version 2023.8.22

Admin Website Home Page

1. The version button is now sticky, meaning it is always positioned in the bottom right-hand corner of the screen no matter the scroll position.

Add/Edit Terms

1. The software will now disallow exit from the procedure if multiple terms have been created but no default term has been set. The software requires a default or current term at all times.

Course, Class & Schedule Reports

1. Performance improvements. All reports within the *Course, Class & Schedule* sub-menu now display up to 3 times faster than before. There is still some delay after clicking the *Submit* button but much less than before.

Add/Edit Participants

1. The *Silent?* column on the participant grid now displays an abbreviated form of the silent contact request, being *No, Email, Phone or Both.*

Add/Edit Courses

1. The *Send Reports To* column on the course grid now displays in abbreviated form, being *Leader, Clerk or Leader & Clerk.* If this value is undefined on the course record, the default value from [Organistaion Details](#Organistaion_DetailsFE7141D5) is now displayed.
2. The *Contact Order* column on the course grid now displays in abbreviated form, being *Leader, Clerk* or *Clerk, Leader.* If this value is undefined on the course record, the default value from [Organistaion Details](#Organistaion_DetailsFE7141D5) is now displayed.

Public landing page

1. If available, the Terms & Conditions button is now displayed on the Member Portal's Public landing page.

version 2023.8.16

System

1. Linux operating system migration

Help

1. The version help page and the help manual accessed from the main menu now display in a popup window rather than a new browser tab. The display of help is now consistent no matter how it is accessed.

version 2023.8.14

Bug fix

1. Corrected "Out of Memory" error in *Leader's Attendance List.*

version 2023.8.12

System

1. Improved layout on Apple devices.

Member Portal | Change your course enrolments

1. Search text box re-styled to improve lost focus issues.

Leader Reports

1. All leader reports now honour a student's silent phone number & SMS Opt Out requests.

Attendance Analysis

1. A new report, *Attendance Analysis* has been added. It provides a graphical analysis of attendance data for the current year to date. The report may be accessed from...
   1. *Administrative portal | Reports | Attendance Reports | Attendance Analysis.* This is a large report consisting of one page per course. It currently has no filtering so the entire report is displayed. You can select the pages you wish to print after the *Print* button is clicked.
   2. *Administrative portal | Portal (Admin) | Leader Report.* A single page report for the selected course may be displayed/printed here.
   3. *Administrative portal | Correspondence Hub | Queue Leader Report*. A single page report for the selected course may be queued for overnight email here.
   4. *Member Portal | My Leadership role | Leader Reports*. A single page report for the selected course may be queued for overnight email here.

The graph depicts the present, absent with apology & absent without apology percentages for the course as bar graphs. Three line graphs are also displayed for comparison purposes...

1. *All U3A: Present.* The present percentage for the U3A group as a whole.
2. *All <Course Type> Present.* The present percentage for the Course Type as a whole, and
3. *Course Regression*: The regression line for the course's present percentage.

If a course's present percentage is above the *All U3A* or *All <Course Type>* lines it means that course attendance is better than those aggregates. Below the line means it has faired worse than the aggregates.

A rising regression indicates that attendance is improving over time while a falling line indicates it is doing worse.

version 2023.8.7

Member Portal | Change your course enrolments

1. Performance improvements, most noticeably when scrolling through the class schedule list.

Member Portal | My leadership role

1. An issue that caused an incorrect display of course/class selections when the course participation type = *different participants in each class* has been corrected.

version 2023.8.5

Class Schedule report

1. **Leader.** The leader is now printed as either the *Guest Leader* or the first leader from the list of three defined in [Add/Edit Courses](#Add_Edit_Courses603B9451).
2. **Contacts**. All leaders & clerks who have not requested their contact details be hidden will be listed as a contact on the non-public version of the report. They will also be identified as a leader or clerk.
3. **Improved Privacy**.
   1. The leader may optionally be displayed on the public version of the report (see *Organisational Details* below).
   2. A contact's email address will not be printed if they have requested it be silent.
   3. A contact's phone numbers will not be printed if they have requested it be silent.
   4. The contact will not be printed if both the email address & phone numbers are silent.
   5. if the contact's phone number is not silent but they have opted out of SMS, the mobile number will be displayed with *(No SMS)* appended.

Member Portal | Change your course enrolments

1. The class schedule display has the same enhancements as the Class Schedule report described above.

Member Portal | View your course enrolments

1. The student enrolments display has the same enhancements as the Class Schedule report described above.
2. If the course has multiple contacts (leader & clerks) only one will be displayed at a time as determined by the *Course Contact Order* (see below). A button titled **Next** will also be displayed which, when clicked will cycle the next contact.
3. if the contact's phone number is not silent but they have opted out of SMS, the mobile number will be displayed with *(No SMS)* appended. Also, the SMS button will not be displayed.

Add/Edit Participants & Member Portal | Your membership details

1. A new field, *Silent Contacts* has been added to [Add/Edit Participants](#Add_Edit_Participants5E221E07). This field replaces the *Silent Numbers* field. You may select Email, Phone, Both or accept the default of None. Be aware of the special rules regarding email...
   1. **Leaders**. A silent email address will not be visible to students.
   2. **Student**. A silent email address remains visible to the leaders & clerks for enrolled courses.

Communicate button (various procedures)

1. The Communication module now honours the participant's *SMS-OptOut* selection. If ticked, the participant will not receive broadcast SMS.

Organisation Details

1. A new field, *Send Leader Reports To* has been added to [Organistaion Details](#Organistaion_DetailsFE7141D5). It allows you to define the person(s) who will receive leader reports by overnight email. The options are...
   1. *Leaders, if none then clerks*. The reports will be sent to the class leader(s). If there are no class leaders, the reports will be sent to the class clerk(s).
   2. *Clerks, if none the. leaders*. The reports will be sent to the class clerk(s). If there are no class clerks, the reports will be sent to the class leader(s).
   3. *Both leaders & Clerks.* The reports are sent to both leaders and clerks.
2. A new field, *Course Contact Order* has been introduced to [Organistaion Details](#Organistaion_DetailsFE7141D5). It allows you to define the default order in which course contacts will be displayed. The options are...
   1. *Leaders then Clerks*,
   2. *Clerks then then leaders.*
3. A new field, *Print leader on public Class Schedule?* has been added to [Organistaion Details](#Organistaion_DetailsFE7141D5). Tick the checkbox if you want the leader's name printed on the public version of the Class Schedule.

Add/Edit Courses

The Course data entry from is now split into tabs, *Course Details* and *Settings*. The new fields below can be found on the *Settings* tab.

1. A new field, *Send Leader Reports To* has been introduced to [Add/Edit Courses](#Add_Edit_Courses603B9451). This allows you to override to whom overnight Leader Report emails are addressed for a given course. It overrides the value of the *Send Leader Reports To* field in *Organisational Details.* The options are...
   1. *Leaders, if none then clerks*. Contact details for leaders will be displayed. If there are no leaders, then the contact details for clerks (if any) will be displayed.
   2. *Clerks, if none then leaders*. Contact details for clerks will be displayed. If there are no clerks, then the contact details for leaders (if any) will be displayed.
   3. *Both leaders & clerks*. Contact details for both leaders and clerks will be displayed.
2. A new field, *Course Contact Order* has been introduced to [Add/Edit Courses](#Add_Edit_Courses603B9451). It allows you to override the default order in which course contacts will be displayed for individual courses. The options are...
   1. *Leaders then Clerks*,
   2. *Clerks then then leaders.*

Queue Leader Reports

1. *Leader Reports* has been renamed *Queue Leader Reports* and is now located in the [Correspondence Hub](#Correspondence_Hub9528C372) as it is a more logical home for it. It has been removed from the *Reports Menu*.
2. The reports are emailed to course contacts (leaders and/or clerks) as described above rather than just leaders. If the contact has a silent email address they will not receive the reports.

Portal (Admin) | Leader Report

1. There is now a new tab titled, *Leader Report*. It allows a selected leader report for a course to be printed. To software allows one report to be printed at a time to conserve server resources.

Leader Reports | Class List

1. Member's address removed from Leader's Class List as it is considered a privacy issue.

version 2023.7.28

1. Introduced guard code to prevent attempt to save a record twice if a *Save* button is double-clicked.
2. Corrected a performance issue in startup of *Add/Edit Enrolment Terms.*

version 2023.7.27

1. Versioning introduced.

Admin | Organisation Details

1. A new field, *Disable Overnight Background Processing* has been introduced. When checked, this option disables all email generated automatically overnight. The option is intended to be used when a group's database is operational but the group is yet to go live.
2. A new field, *Send Leader Reports to* has been introduced. Allows you to define to whom overnight Leader Report emails are addressed. The options are...
   1. **Leaders then clerks**. (default) The system will attempt to send email to leaders. If there are no leaders with an email address, the reports will be emailed to clerks.
   2. **Clerks then leaders**. The system will attempt to send email to clerks. If there are no clerks with an email address, the reports will be emailed to leaders.
   3. **Both**. The report will be sent to both leaders and clerks.
3. There has been a significant rework of the screen layout to accommodate the recently added options.

Participation | Correspondence Hub

1. Convert UTC date & times to local.

Participation | Bank Data Import

1. Bank Data Import. Convert UTC date & times to local.

# Frequently Asked Questions

A grab bag of questions and answers.

* [The difference between a Participant and a Contact](#The_difference_between_a_Parti198A4145)
* [How to safely move a class between terms](#How_to_safely_move_a_class_bet998A1656)
* [What is Member Portal Maintenance Mode](#What_is_Member_Portal_MaintenaE6D25AF1)
* [What is the difference between a Refund and a Credit](#What_is_the_difference_between39BC66CE)

## The difference between a Participant and a Contact

A **participant** is a person actively involved in the U3A. A participant pays fees, may enrol in a class and may also lead a class. A participant is said to be financial if their fees for the current year are paid.

A **contact** is a person not actively involved in the U3A but has some association with it. They might be suppliers, tradespeople or politicians. They are not financial members of the U3A. Think of your contacts list as the U3A's virtual Teledex.

A contact may be assigned one or more **Tags**. A tag is simply a means of grouping like contacts together. A tag might be the organisation to which they belong, the type of trades person they are etc. etc.

Interestingly, Tags have two fields, *Can Lead?* and *Can Enrol?*. A contact may therefore be created that is allowed to participate in classes either as a leader and/or a student. However, a Contact *is not a Participant* and it is important to understand the difference*.*

These differences are summarised in the following table...

| Property | Participant | Contact | Comment |
| --- | --- | --- | --- |
| Use Member Portal | Yes | No | A Contact cannot log into the Member Portal. |
| Pays Membership Fees | Yes | No | A Contact cannot be assigned a membership fee or be receipted. |
| Can be grouped | Limited | Yes | Participants can be life members, financial, leaders, clerks etc but the ability to group is limited. At a systems level this is important so as to avoid any perception of discrimination.  Contacts are grouped by assigning each contact one or more tags. |
| Can enrol in class | Yes | Optional | A contact may enrol in classes if it is assigned a tag with the field *Can Enrol?* ticked. |
| Can lead a class | Yes | Optional | A contact may be a class leader if it is assigned a tag with the field *Can Lead?* ticked. |
| Include in Auto-Enrolments | Yes | No | A contact is not automatically enrolled in a class. Rather they a manually added via [Enrol Participants](#Enrol_Participants6C90983F). They cannot be enrolled via the Member Portal. |
| Enrolments brought forward from term to term | Yes | Yes | Once enrolled, both participants and contacts remain enrolled for the year. |
| Enrol in Multi-Campus Course | Yes | No | Contact enrolment is limited to the local U3A only. |
| Receives enrolment confirmation email | Yes | Yes | A Contact will receive enrolment confirmations if a they have an email address. |
| Receives leader reports | Yes | Manual Only | A Contact does not automatically receive leader reports. However, persons with access to the administrative website may request reports on behalf of the Contact who will receive them via their email address. |

## How to safely move a class between terms

When a participant enrolls in a class, that enrollment is tied to the current enrollment term or the term in which the class first occurs. As we move from one term to the next those enrollments are *brought forward* into the new term.

Sometimes, you may have a class that occurs in one term only that has to be moved to a later term. For example, an excursion that has been postponed from term 3 to term 4 because of inclement weather. Simply, changing the class start date will cause all enrollments to be lost (because the enrollments are tied to term 3).

To make the change and keep all enrollments, perform the following steps...

1. Using [Add/Edit Courses](#Add_Edit_Courses603B9451) create a new class record for the course. Keep all details for the new class the same as the original class except for the new start date. At completion of this step you will have a course with two classes.
2. Using [Enrol Participants](#Enrol_Participants6C90983F) transfer (move) all enrollments from the original class to the new class.
3. Go back to [Add/Edit Courses](#Add_Edit_Courses603B9451) and delete delete the original class.

When the above steps are complete, your course will have been moved to the new term and all enrollments will remain intact.

## What is Member Portal Maintenance Mode

Member Portal Maintenance mode denies members access to the Member Portal until advised.

Maintenance mode is activated...

1. **Manually** via [Enter / Exit Maintenance Mode](#Enter___Exit_Maintenance9ED450CD), or
2. **Automatically** when you enter a period of time in which no enrollment period has been defined.

For example, if the enrollment period fro Term 4 ends at the close of November and the enrollment period for Term 1 the next year does not start till January then enrollments are not allowed for the month of December. The system will automatically place the Member Portal into maintenance mode for December.

Note that when activated manually, maintenance mode must also be exited manually.

## What is the difference between a Refund and a Credit

Refunds and credits are similar in that they both reduce a member's liability to the U3A. The primary difference between the two is that a refund is the repayment of money to the member whereas a credit is the reduction in fees due.

A ***Refund***is a negative receipt. You create a refund via [Add/Edit Receipts & Refunds](#Add_Edit_Receipts228A25EE). A refund is money that is returned to the member. For example, Susan enrolls in Aquarobics and pays a $50.00 course fee. She then falls ill and withdraws from the course. She will be *refunded* the $50.00 course fee.

A **C*redit*** is a negative fee. You create a credit via [Add/Edit Fees & Credits](#Add_Edit_FeesC51AA304). A credit represents a change to the fee being charged. It does not represent money paid to your U3A. For example, Tom also enrolls in Aquarobics for which there is a $50.00 course fee. However, the enrollment is late and it is determined that he needs only pay $30.00 for the remainder of the course. A Credit of $20.00 is created to reduce the fee to $30.00.

# User Interface (UI) elements

Key concepts underlying our software.

* [Your Internet Browser](#Your_Internat_Browser2E04354A)
* [UI Components](#UI_ComponentsB6E3855B)
  + [Main Menu](#Main_Menu79C9A26B)
  + [Grid](#Grid)
  + [Pivot Table](#Pivot_TableC34EC49B)
  + [Form](#Form)
  + [Report](#Report)
  + [Communicate](#Communicate)

## Your Internet Browser

The U3Admin.org.au application executes within the context of your Internet browser. It is therefore a special form of a standard web page. All processing is performed on Microsoft Azure servers. Your browser is simply used to display the page and accept your input.

Google Chrome, Microsoft Edge, Mozilla Firefox and Apple Safari are the most common browsers. However, there are many others; Opera, Brave, Colibri, Iridium and Tor are but a few examples.

The browser you use is completely your choice, so long as it is kept up to date. The software has been tested on Edge, Chrome, Firefox, Safari and Opera.

When using your browser, it is important to know a couple of shortcuts...

| Keyboard Shortcut | Function | Description |
| --- | --- | --- |
| F1 | Help | Access the bowser's help system. |
| F5 | Screen Refresh | Reloads the current tab using cached data, if possible. |
| Shift-F5 | Screen Refresh | Reload the current tab ignoring cached data |
| F11 | Full Screen | Enters/Exists full screen. Ideal if using a small laptop screen. |
| Tab | Move next field | Used when entering data. Press tab to move from one data entry field to the next. |
| Shift-Tab | Move previous field | Used when entering data. Press shift-tab to move from one data entry field to the previous. |
| Mouse click | Link navigation | Click a web page link to navigate to the linked content. Note that a menu item is simply a navigation link with special rendering. |
| Shift-Mouse click | Link navigation | Click to follow a navigation link but open in a new browser window. This function allows you to have multiple browser pages accessing the same or different U3Admin content at the same time.  **NB**: Use sparingly. Overuse of the function can drain server resources. |
| Ctrl-Mouse click | Link navigation | Click to follow a navigation link but open in a new browser tab. This function allows you to have multiple browser pages accessing the same or different U3Admin content at the same time.  **NB**: Use sparingly. Overuse of the function can drain server resources. |

## UI Components

Within a U3Admin display page UI components are used to accept user interactions, display information and input data.

**User Interaction**

The most common user interaction is site navigation. This is performed via the application's [main menu](#Main_Menu79C9A26B). You may also find standard navigation links within the software, especially this help system. The [main menu](#Main_Menu79C9A26B) link above is one such example. Within our software links are most often displayed as buttons, [](#Main_Menu79C9A26B)

**Display Information**

The [grid](#Grid) is the primary means by which two-dimensional data is displayed on-screen. This is a spreadsheet-like component that displays data in rows and columns. Columns can be sorted, grouped and filtered. The grid can be exported to Excel for in-depth analysis and printing.

One-dimensional data such as a single participant record will normally be displayed in a [form](#Form). Forms consist of fields into which data is entered and/or changed. Normally, forms are accessed by clicking the add or edit button on the required row of a grid.

Finally, data is displayed in [reports](#Report). A report is a formal document and is usually intended for printing. As such it is not editable. However, reports can be exported to Excel in which they can be edited. Information on a report can be searched and usually simple filtering is also available.

**Input Data**

Data is entered via a [form](#Form) as discussed above. The components used to enter data are known as editors. Each distinct data type owns it's own editor. A text editor allows the entry of text, a date editor the entry of date and time, a check box the entry of true/false values and so on. There are many editors ranging from the humble text editor through to the complex rich-text editor that incorporates many of the features found in a word processor.

### Main Menu

The main menu is displayed either in the top header of the U3Admin web page, or as a sidebar on the left-hand side of the screen. Use [Theme & Settings](#Theme__Settings18DAF320) to choose the top or sidebar menu style to your liking.

Menu items are categorised into *Menu Groups*. Menu groups have a title such as Admin, Course, Participation etc. The menu groups displayed on your menu depend on the access rights provided to you by your system administrator. if you believe you require access to an option you do not see, ask your system administrator to provide you with additional authorisation.

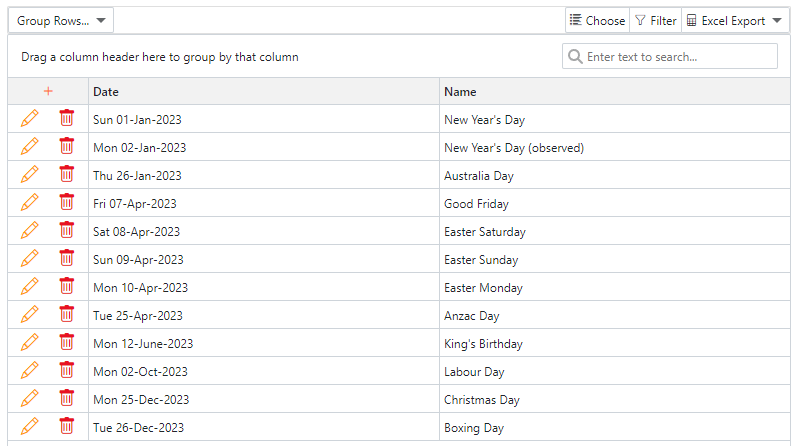
Both menu styles are responsive to changes in your device's screen size. On smaller devices they will, by default be hidden. To activate the menu, click the "hamburger" icon on the top left hand side of the screen.

### Grid

The grid is the component used to display two-dimensional data...

* *Records* such as course, venues and participants are displayed as rows down the grid
* *Fields* such as name, address and phone numbers are displayed as columns across the grid. The header at the top of each column is known as the *Column Header* and is used to interact with the column.

Most often, a grid will have a *Group and Search Panel*, and a *Toolbar* associated with it...



The Public Holidays grid with its group and search panel and associated toolbar

The grid offers many powerful feature to assist in drilling down into the information your require...

Column Management

Sorting

Click a column header to sort by that column in descending order. Click again to sort in ascending order.

Use SHIFT-Click to sort by multiple columns, clicking each required column in the order of sort.

Use CTRL-Click to clear the column sort.

Column Resize

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| --- | --- |
|  | To resize columns and bands, drag the right edge of the target column |

Rearrange Columns

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To rearrange or reorder columns, use the mouse to drag the column into the desired position, or

Click *Choose* on the *Toolbar.* In the pop-up window, move the column headers using the drag bar on the right.

Add/Remove/Re-Order Columns

|  |  |
| --- | --- |
|  | On the toolbar, click *Choose*.  In the pop-up window, tick or untick those columns you wish displayed or hidden.  You may also re-order columns by clicking the drag-handle to the right of the field and dragging up or down. |

Layout

The *Layout* toolbar button may be displayed instead of the *Choose* button. **Layout** provides the ability the choose the columns to be displayed and to save that display for later use. The option consists of three buttons.

1. **Choose Fields**. This option will display the *Column Chooser* window as described above.
2. **Save Layout**. This button saves the chosen layout. All future grid displays will use the saved layout.
3. **Reset Layout**. This button resets the grid layout to its default. The saved layout will be deleted.

**Note:** The *Layout* button requires additional programming to implement. It is only found on some grids such as [Add/Edit Participants](#Add_Edit_Participants5E221E07)

Group Data

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To group data drag a column to the *Group Panel* above the column headers.

To un-group, drag the column from the Grouping Panel back to the column header bar.

Use the arrow marks to the left of the grouped row to expand/collapse the group detail. Use the *Group Rows...* toolbar menu options to expand/collapse all rows.

If the column you are grouping is a date, use the *Group Rows...* toolbar menu options to group by day, month or year.

Searching & Filtering

Searching

Enter text into the search box within the group panle to find all occurrences of that text.

If multiple words are entered, the software will search for each word individually. To search for the combination of multiple words, enclose them in punctuation marks.

Filtering

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| --- |
|  |

Click the *Filter* button on the *Toolbar* to display the filter panel. Two types of filtering will be available...

**Column Header Filter**

Click the filter on any column header. This will display a filter pop-up showing all unique values within the column's rows. Select a data item by...

1. Tick the check box to the left of the column title to select that column, or
2. Use SHIFT-Click to select a range of values.

When selection is complete, click *Apply.*

**Inline Filter Row**

Use the row displayed immediately below the column headers, to filter by an explicit value. The form of entry will depend on the type of data being filtered. If text, enter the filter as text, if a date select the date from the list etc.

Selection

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If provided, rows can be selected by clicking the selection check box usually located as the left most column on the grid. Use the check box located on the column header to select/deselect all rows. A range of rows may be selected by using SHIFT-Click on the row.

A grid toolbar button, *Selected Only?* will be displayed when a grid has a selection column. It will display selected records only when clicked. If clicked again, all records will be displayed.

Excel

Click the *Excel*button on the toolbar to export the grid's data as an Excel spreadsheet.

When you click the Excel button, a popup dialog will be displayed giving you with the ability to input a title. The title is used as the exported data file name.

The export will be downloaded as an file and placed in the Downloads folder on your PC.

Print

Click the *Print* button to create a PDF report.

When you click the Print button, a popup dialog will be displayed giving you with the ability to input the following options...

1. *Report Title*. The title is placed at the top of the first page of the report.
2. *Print Portrait?* by default, reports will be created in landscape orientation. Tick this box to display in portrait mode.
3. *Column Widths*. Your options are...
   1. *Fit To Page*. The default is to print the report so that it will fit on one page.This may sometimes result in excessive word wrapping to make each column fit. To reduce test wrapping, reduce the number of columns you require on the report.
   2. *Fit Column Width*. The alternative is to use the actual grid column sizes when creating the report. if *Auto Fit* has previously been applied to the grid, this option will result in minimum word-wrapping on the report. However, reports with many columns may extend over more than one page.
4. *Font Size*. A choice of common font sizes, the default being 8pt.
5. *Page Size*. You may choose A4 or A3 page size.

Combined with the ability to manipulate the grid by sorting, grouping, filtering and column layout, you now in effect have a report writer to create your own PDF reports.

### Pivot Table

A **Pivot Table** is a conceptual data structure used to summarize, reorganize, and analyze multidimensional data. It is a powerful abstraction for transforming raw tabular data into meaningful insights.

It works by grouping data along one or more **dimensions** and applying aggregation functions (like sum, count, average) to the grouped values.

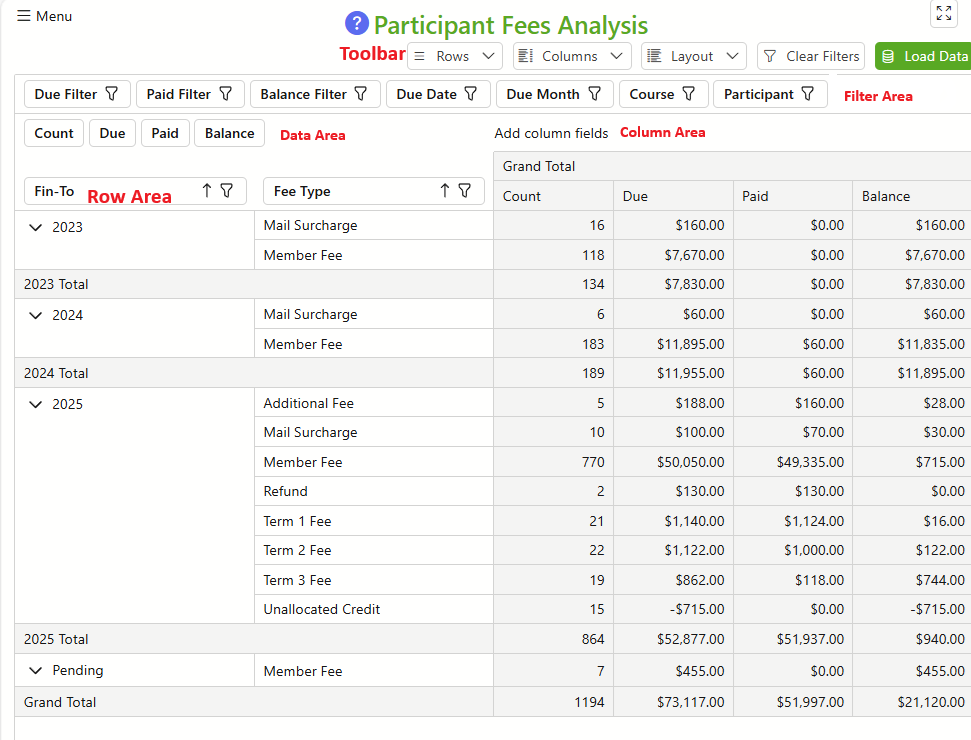
A pivot table is smart summary of your data. It is used to identify patterns in your data. Instead of counting or adding things up manually, a pivot table does it for you, automatically grouping and calculating the numbers based on what you care about.

It helps you spot trends, compare categories, and make decisions faster.

**Components of a Pivot table**

| **Component** | **Description** |
| --- | --- |
| Rows | Categories or dimensions used to group data vertically |
| Columns | Categories or dimensions used to group data horizontally |
| Data | Aggregated metrics (e.g., totals, averages) calculated for each row-column pair |
| Filter | Criteria used to include/exclude data from the summary |

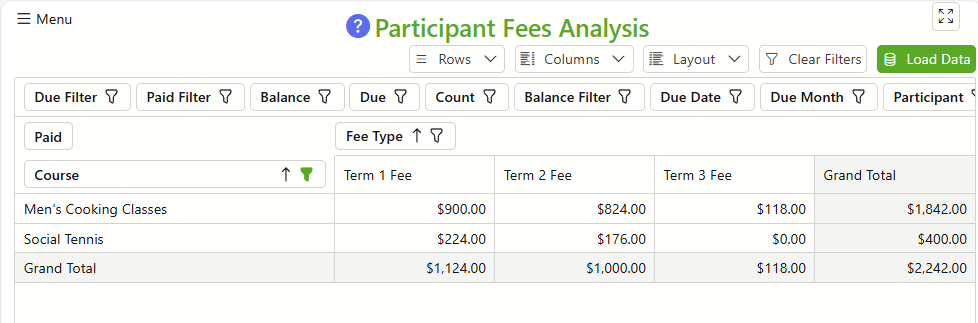
These components are represented on the Pivot Table as Areas as shown in the image below. Items in the Filter Area can usually be dragged to to the Column or Row Areas and vice-versa. Items in the Data Area can be moved to the Filter Area. The effect of moving an item to the Filter Area is to remove that item (Dimension) from the aggregation.



Suggested Workflow

It is usually a good idea to start with a summarised view of your data such as that displayed above. A summarised view will quite often highlight anomalies or insights into your data. Then, rearrange your dimensions to obtain the analysis you want.

For example, below is the same data as above but rearranged to show Course fees paid for each term. Moving the *Participant* dimension to the Row Area would show the fees paid by each student in the course.



### Form

Normally, data is entered via a *Form*. A form is accessed usually via the grid or directly from the menu if a grid is not required.

If accessed via the grid, that grid will have a combination of add, change or delete buttons. The buttons displayed will be determined by the developer. The *Add* button is displayed as a plus (+) symbol on the grid's column header. The *Edit* and *Delete* buttons are displayed as a pencil and bin on each row respectively.

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The form is displayed as a modal window above the grid...

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Enter the data as required and click the *Save* button. If you are simply viewing the data, click the *Cancel* button to ensure you do not save any unwanted changes.

When *Save* is clicked, the software will validate your input. If there are issues the system will display messages to inform you of what needs to be changed. Change your input until it is acceptable and click *Save* again.

Sometimes a form will contain a *Discontinued* check box. This will be provided in place of the *Delete* button on the grid. A discontinued record is a record you no longer require within the system, yet other records may depend on it so that it cannot be deleted. Discontinuing a record can therefore be thought of as a *soft delete*; it is no longer available for use but remains to ensure data integrity within the database.

**Hint:** Find Required Fields

To find all required fields on a new record, press the *Save* button prior to entering any data. All required fields will be displayed as validation errors.

Data Editors

Editors are the boxes into which you enter data. They range from the humble text box into which any character may be entered through to the rich text editor providing word processing functionality to the system.

In between there are editors for each type of data; the date editor to enter dates, spin editor to enter whole numbers, selection editors to select one or more items from a list and editors to enter currency and decimal numbers. The purpose of these editors is to reduce the opportunity to enter invalid data into the database. Thus a date editor, for example will only accept valid dates.

All editors other than the simple text editor will have a button to provide additional functionality via a drop-down window. This will be specific for the data type being entered. The date editor for example, will display a calendar from which to select the date. It is not compulsory to use the calendar as the date may be entered using the keyboard.

**Hint:** Use *Tab* to move between editors

Use the *tab* key to move between editors. The tab key will move to the next editor in sequence. The SHIFT-tab combination will move to the previous editor. The tab key is a far more efficient method of data entry than using a mouse. Importantly, it reduces the potential of Repetitive Strain Injury (RSI) that can accompany heavy mouse use.

### Report

Reports are the formal output from the system. As such they cannot be directly edited unless specifically allowed to do so by the developer. However, reports can be exported to a number of formats some of which allow editing, such as Microsoft Word (DOCX) and Excel (XLSX) formats.

All reports are displayed in a common *Report Viewer* containing a toolbar and side panel as well as the display surface.

**Toolbar**

Use the toolbar to go to a specific page, change the report font size (zoom) and print or export the report.

Many export options are provided, the most commonly used are...

* Adobe PDF to forward the report via email or place on a website, and
* Microsoft Excel to analyse the report's data.

**Side Panel**

The side panel is used to input *filter parameters* and *search* for text within the report. The options are on pages selected via the icons on the right hand strip. To move to a required page, click that page's icon. To close the side panel, click the currently highlighted side panel icon.

**Filter parameters**

The default is the filter page in which report parameters are entered. Most often, report parameters will have a default value which can be changed as required. Parameter values can be quickly set back to default by clicking the *Reset* button. When parameter entry is complete, click the *Submit* button to generate the report.

**Note:** No wait indicator

Due to a limitation of the development environment, there is currently no wait indicator to show the report is being generated. please be patient while this process occurs.

**Search**

Click the *Search* icon on the side panel strip to search for text within the report. Once open, enter your search text into the editor provided. The software will find all occurrences of that text within the report and list the results in the side panel. Use the arrow buttons to move to the next or previous occurrence. Alternatively, click one of the listed entries to proceed directly to that result.

### Communicate

The **Communicate** module is a general purpose procedure designed to facilitate communication between the U3A and it's membership. The procedure is capable of...

* Sending email to all or a subset of members.
* Sending SMS to members, and
* Sending mail via traditional post to members.

 General Comments

|  |
| --- |
| The Postal Service  Sending email and SMS are digital processes and are completely handled within the application. Post however, requires manual intervention. The software will package all postal items into a single PDF and email it to the *Send Email Address* as defined in [Organistaion Details](#Organistaion_DetailsFE7141D5). It is then the recipient's responsibility to print the PDF and manually post to the required members. All proforma stationary is designed to fit into standard window envelopes.  Broadcast (bulk) Email  All email sent via the **Communicate** procedure will be placed into the broadcast email stream. This stream has the highest potential to be considered spam by members email service providers. Care should therefore be exercised in crafting the email.  In addition, all broadcast email must provide the ability to opt-out or unsubscribe. This is normally a link at the bottom of the email. You cannot create an email without this link.  SMS  The Australian Government now requires a formal registration and authentication process before you can create bulk SMS messages. Be aware the process is somewhat onerous and time consuming to complete. Also, compared to email, SMS can be quite expensive. |

Using the procedure

After clicking the **Communicate** button within any procedure in which it is displayed, the software will popup the *Communicate*window.

To begin, select a *Document Template* from the list provided. Document templates are created by administrators using the [Add/Edit Document Templates](#Add_Edit_Document_TemplatesD74CB6CA) procedure. Templates assist in the creation of documents by pre-filling communications parameters and optionally, the document text.

Alternatively, you may select *Custom Email* as the document template. This allows the creation of an email document without reference to any template.

Depending on the communication type, you will be presented with one of the following.

**Email**

| Field | Description |
| --- | --- |
| Email Subject | Text to be placed on the email's Subject line |
| Email Preheader | (Optional) The email Preheader is a short message displayed in the email inbox immediately below the Subject line. Use wisely to significantly increase the likelihood of an email being opened and read. |
| From Address | The email address of the sender. Note that the email **must be sent from an email address containing the U3A's registered domain.** By default, the *Send Email Address* found in [Organistaion Details](#Organistaion_DetailsFE7141D5) will be used. |
| From Display Name | A friendly name to be displayed on the email's *From* line. By default, the *Send Email Display Name* found in [Organistaion Details](#Organistaion_DetailsFE7141D5) will be used. |
| Attachments | Click the button to upload files to be attached to the email. Only PDF files are currently allowed. |

**SMS**

| Field | Description |
| --- | --- |
| From (11 Chars Max) | A friendly name identifying who the email is from. This will be displayed instead of a phone number on the recipient's mobile device. **This name must be the registered name as provided to the sending service.** |

**Post**

No additional information is required for postal documents.

**Override Communications Preference?**

All document communication types will ask if the communications preference is to be overridden. This will only occur if the member has provided sufficient detail to send via the communication type selected. For example, if the communication type is Email and the member has requested postal delivery, that member will receive an email *only if they have supplied an email address* when this option is checked.

The option therefore has limited utility except for postal items. For example, if it is decided that a document must be sent to all members using the postal service, check this box to override those members who have elected to use email as their primary means of communication.

**Document Text**

Enter or amend the text to be sent to recipients. If using a document template be careful not to edit any mail merge tags that may exist in the text.

Sending the Document

To print postal documents, click the **Mail Merge** button on the document editor to create and preview the merged documents. Print/export the report from the print-preview dialogue.

Click the **Send Email** to send mail or SMS. This button is located at the bottom right-hand corner of the window. The document will be merged and sent without further operator interaction.

# Admin Menu

Administrative menu options for those with high privilege.

* [Login & Role Assignment](#Login_Security__Role_Assignmen00B206AC)
* [Organisation Details](#Organistaion_DetailsFE7141D5)
* [Membership Fees](#Membership_FeesD7AD44D4)
* [Add/Edit Document Templates](#Add_Edit_Document_TemplatesD74CB6CA)
* [Restore Deleted Courses](#Restore_Deleted_Courses4EB7A19D)
* [Restore Deleted Participants](#Restore_Deleted_ParticipantsE9DF988B)

## Login & Role Assignment

**Login & Role Assignment** provides access to the login parameters used to authenticate and authorise system users.

Login

All users must successfully login to the system in order to use it. The login procedure **authenticates** the user.

Other than the login parameters, it is important to understand a login record contains no other detail about the participant. That is the role of the [Participant](#Auto_Enrol_ParticipantsC8FFD4C5) record.

It is possible to have a login that is not a U3A participant and it is also possible to have a U3A participant that does not have a login. Typically however, they are linked and that linkage is created when both the login and the participant records share the same email address.

It is possible for a participant to have two logins. Usually, they are used as follows...

1. The first is the participant's real personal email address. It is used for non-administrative purposes; to gain access to the Member Portal and receive email.
2. the second is used to access the Administration Portal. This can be a real email address or a Domain Login (see below). In either case both use the U3A's registered domain in their address.

Passwords

The password is never stored on the login record. Rather a password hash is stored. A hash is a seemingly random sequence of characters generated from the actual password plus a predefined seed value.

To validate a password, the system takes the entered password and re-generates the hash value. If the re-generated value equals the stored value the entered password passes validation.

Importantly, it is currently impossible to reverse the process. You cannot obtain the password from the stored hash value.

Therefore, user passwords cannot be obtained by hacking the database.

Password hashing is a specific form of a more generalised [Key Derivation Function (KDF)](https://en.wikipedia.org/wiki/Key_derivation_function). For a in-depth discussion of password storage refer [Password Storage Cheat Sheet.](https://cheatsheetseries.owasp.org/cheatsheets/Password_Storage_Cheat_Sheet.html)

Roles

Roles **authorise** the user to allow or deny them access to procedures and modules within the system (that is, menu items).

Those assigned a role will have access to the Administrative Portal. Those without a role will have access to the Member Portal only. Roles are assigned using this procedure.

The available roles are...

| **Role** | **Description** |
| --- | --- |
| Security Admin | Access to this procedure and Tenant Details procedure. |
| System Admin | Access to the **Admin** menu column except this procedure. |
| Course & Class | Access to the **Course** menu column |
| Membership | Access to the **Participation** menu column but not it's [Fees & Receipting](#Fees__Receipting29A00D07) sub-menu |
| Accounting | Access to the **Participation** menu and it's [Fees & Receipting](#Fees__Receipting29A00D07) sub-menu |
| Office | Access to the [Portal (Admin)](#Portal__Admin_92789C99) menu item. |
| Report View | Access to the [Reports Menu](#Reports_Menu78FEF7DD) column. |

A login may have multiple roles. In this case the authorisations will be combined. Thus a login with the Security Admin role and the System Admin role will have access to all items on the Admin menu column.

The above table also identifies a hierarchy that for the most part is honoured. Thus, the System Admin has access not only to the Admin menu column but also all menu items to the right of it (or, below it in the table above). The exceptions to this are...

1. The Security Admin role has no access to anything other than this procedure. A purist would consider it a security risk assigning a Security Admin access to any other role. It is also possible for the U3A group to outsource the Security Admin role to a third party without granting access to any other system function.
2. The Office role has no access to any other menu columns.

The role with the least access is the Report View role. It has read-only access to the reports menu column only.

Buttons

The following buttons are located at the top of the procedure and are typically used to perform an action on a group of participants...

| **Button** | **Description** |
| --- | --- |
| Create Domain Login | A domain login is typically used to provide a user with access to the administrative website in addition to their normal login used to access the Member Portal. |
| Populate Logins | Use *Populate Logins* to create login records for participants that have been manually created via [Add/Edit Participants](#Add_Edit_Participants5E221E07). It will create a login record for every participant that does not have a login record using the *Email Address* and *Member Identity* as the password. |
| Set Email Confirmed | Intended to be used to set the *Email Confirmed* flag should a participant be not able to respond to their login/password reset confirmation email. This option should be only used after ensuring the email address is correct. Emails can be confirmed as correct by using the Postmark third-party website,  To use this option, select the required participant(s) and then click. |
| Reset Password | To reset password(s), select the required login record(s) and then click. The password will be reset to the participant's *Member Identity*.  Password reset is meant to be a self-service activity. Use this option only when problems persist. |

Login Record fields

Use the grid's Edit / Delete buttons to maintain logins. Note that logins can only be created using the *Populate Logins* button as described above or by the participant registering their login via the Member or Administration Portals. Self-registration is the normal form of creating a login.

| **Field** | **Description** |
| --- | --- |
| User Roles | Select from the list provided, the roles to be assigned to the participant. Leave blank for Member Portal access only. |
| Is Email Confirmed? | Tick to set the email confirmation flag as confirmed. Once set, this field cannot be changed. |
| Password | Enter a strong password, or leave blank if the password is unchanged |
| Confirm Password | Re-enter the password, or leave blank if the password is unchanged |

## Organisation Details

**Organisation Details** are basic items of information pertaining to the U3A Group as a whole. They include such things as name, address and contact details. They also include parameters used to automatically enrol members into courses, committee positions, volunteer groups and mail label parameters. Finally, it allows input of the group's Term & Conditions.

In short, it is a grab bag of parameters used throughout the system. They are values that must be defined before any other part of the system is used but once defined, rarely change.

The procedure is divided into the following tabs...

1. **Your Group's Details**, contains the organisation's name and address details, committee and volunteer group names.
2. **Operations**, contains parameters used in the automatic allocation of enrolments and waitlists as well as other parameters that control the behaviour of the system,
3. **Terms and Conditions**, allows the entry of text in Rich Text Format (RTF). Members are required to accept these T&C's on a regular basis.
4. **Multi Campus.** Allows your U3A to accept courses offered by other U3A groups (campuses) using the U3Admin system, and allows your U3A the ability to offer courses to other campuses.

Your Group's Details tab

The Organisation Details group

| **Field** | **Description** |
| --- | --- |
| UTC local time offset | The number of hours difference between UTC time (GMT+0.00) and local time, ignoring any daylight savings adjustment. For Australian Eastern Standard Time accept the default of 10.  This value is used to calculate local time during overnight processing, only. |
| U3A Group | The registered name of the U3A group. |
| Australian Business Number (ABN) | The group's ABN |
| Office Location | The office building name, if any. For example, The Fred Smith Memorial Library |
| Office Street Address | The office street address, if any |
| Office Postal Address | The group's postal address, if any. |
| Phone Number | The group's phone number for member support |
| Email Address | The group's primary email address. Most often this is the address of the secretary. |
| Website | The group's public website. This is not the u3admin.org.au address. |
| Send Email Address | The email address from which automatic emails are sent. Automatic emails are generated in response to changes in enrolment and the receipt of membership fees. It is most often the address of the membership coordinator.  This address will also receive an email from the system postman overnight detailing system warnings and information. |
| Send Email Display Name | The send email address display name. For example, myU3A Membership Office. |
| Support Email Address | The email address to which member support requests will be directed. If left blank, support email will be directed to the *Send Email Address.* |
| System Postman CC Address | Optionally, enter additional email addresses to receive system warnings and information from the system postman. |

The Bank Details Group

| **Field** | **Description** |
| --- | --- |
| Bank BSB | The bank BSB into that receives membership fees when members make payment via the direct payment method. |
| Bank Account Number | The bank account into that receives membership fees when members make payment via the direct payment method. |

The Committee Positions group

Enter the committee positions, one per line. These positions are used when configuring the committee in [Add/Edit Committee](#Add_Edit_Committee1A4831A2).

The Volunteer Activities group

A volunteer activity is normally an activity that occurs regularly within the group that is not considered a Course. Examples might be grounds maintenance, office administration or other assistance to the U3A group. Once defined, volunteer groups can be contacted by email/SMS as a group.

Optionally enter volunteer activities, one per line. You can then assign participants to the activity using [Add/Edit Volunteers](#Add_Edit_Volunteers56664DC8).

The Ceased Reasons group

Enter reasons a person may cease membership, one per line. These reasons are used when ceasing a member in [Add/Edit Participants](#Add_Edit_Participants5E221E07).

The Operations tab

The Class Schedule group

Options that affect the *Class Schedule* report.

| **Field** | **Description** |
| --- | --- |
| Report for the period | The *Class Schedule's* reporting period. It may be one of the following values...   * 1. **For the full year**. The report is printed for the current term through to the end of the year.   2. **For the current semester only**. The report is printed for the current term through to the end of the current semester.   3. **For the current term**. The report is printed for the current term only. |
| Print leader on public report? | Tick if you wish to print the leader's name on the public version of the *Class Schedule* report. Please remember that the public *Class Schedule* is available to **everyone**, irrespective of whether or not they are logged in. As such, printing a person's name on this report might be considered a privacy issue. |
| Occurrence | The number of times automatic randomised allocation will occur throughout the year. Select from...   1. **Per Year.** Once a year prior to term 1. 2. **Per Semester.** Twice per year. Once prior to term 1 and once prior to term 3. 3. **Per Term**. Prior to each and every term. |

The Auto Enrolment group

The allocation rules discussed in these sections only apply to the *Enrolment Allocation Day when allocation is* random (see below). Allocation at all other times of the year occur on a *First In Wins* basis.

| **Field** | **Description** |
| --- | --- |
| Rule 1: New Participant Percent (%) | Enter the percentage of enrolment places that will be allocated to new students. For the purpose of auto-enrolment, a new student is one that has joined in the current financial year and has not yet been enrolled in any of their selected courses.  Once enrolled in one or more courses, they are no longer considered a new participant. |
| Rule 2: Remainder Allocation Method | The allocation method may be **random** or **first in wins**.   * **Random**. Students are enrolled into their selected courses on a random basis. Random allocation is considered a fair and equitable means of allocating students to an oversubscribed course. Refer to Enrolment Allocation Day below for further details. * **First in wins**. Students are allocated on a first come, first served basis. Use this method if you wish to encourage students to enrol early. |
| Enrolment Allocation Day  Randomised allocation occurs once per *allocation period* on a date calculated by the configuration parameters below. After that date any new enrolments for the period are allocated on a *First In Wins* basis.  The parameters below are ignored if Rule 2 above is *First In Wins*. In this case allocation occurs at enrolment.   | **Field** | **Description** | | --- | --- | | Week(s) Before Term Start | The number of weeks prior to term start in which automatic randomised enrolment will occur. The allowed values are from -1 being the week before term start to -4 being four weeks from the start. The default is -2 meaning the allocation will occur 2 weeks prior to term start. | | On Day | The weekday on which automatic allocation will occur. The default is Tuesday. | | Occurrence | The number of times automatic randomised allocation will occur throughout the year. Select from...   1. **Per Year.** Once a year prior to term 1. 2. **Per Semester.** Twice per year. Once prior to term 1 and once prior to term 3. 3. **Per Term**. Prior to each and every term. | | |

The Leaders / Clerks Group

| **Field** | **Description** |
| --- | --- |
| Send Leader Reports To | Determines the recipients of leader reports sent automatically overnight...   1. **Leaders, if none then clerks.** Leader reports will be sent to leaders. if there are no leaders with email addresses then the reports will be sent to clerks. 2. **Clerks, if none then leaders.** Leader reports will be sent to clerks. if there are no clerks with email addresses then the reports will be sent to leaders. 3. **Both**. Leader reports will be sent to both leaders and clerks with email addresses. |
| Course Contact Order | Defines the order in which a course contact is determined. The options are...   1. Leaders then clerks, or 2. Clerks then leaders   Class contacts can either be leaders or clerks all of which are optional and some may have requested their contact details to be silent. The software will therefore choose the contacts based on the order selected and who do not have their contact details silenced. |
| Allow leader/clerk to change enrolment? | If not ticked, enrolment can only be changed by persons with **Membership** authorisation or above. Otherwise, leaders and clerks may also move students to and from the waitlist via the *Member Portal*. |
| Allow leader/clerk to change enrolment? | If not ticked, clerks can only be assigned by persons with **Membership** authorisation or above. Otherwise, leaders may assign clerks via the *Member Portal*. |

The Other Settings Group

| **Field** | **Description** |
| --- | --- |
| Require Vax Certificate? | Tick this check box if you require the sighting of vaccination certificates. |
| Allow Person Post-Nominal Letters? | [Post-nominal letters](https://en.wikipedia.org/wiki/Post-nominal_letters) are letters placed after the name of a person to indicate that the individual holds a position, office, or honour. Tick to allow the entry of a participant's post-nominal letters in the *Member Portal*. Post-nominal letters may always be entered via [Add/Edit Participants](#Add_Edit_Participants5E221E07). |

The Mail Labels group

Define the parameters for mailing labels. Labels are normally supplied as an A4 sheet. The default values are suitable for most...

| **Field** | **Description** |
| --- | --- |
| Top Margin | The distance in centimetres from the top of the sheet to the top of the first label perforation. |
| Bottom Margin | The distance in centimetres from the bottom of the sheet to the bottom of the last label perforation. |
| Left Margin | as above but for the left margin. |
| Right Margin | as above but for the right margin. |
| Label Height | The height in centimetres of one label |
| Label Width | The length in centimetres of one label |

The Data Retention Group

These parameters determine how long the system will store your data. If in doubt, simply keep the default values.

| **Field** | **Description** | **Default** | **Minimum** |
| --- | --- | --- | --- |
| Attendance data (years) | The number of years to retain attendance data. Most system statistical aggregates are derived from attendance records. Retaining this data enables good historical analysis. | 5 years | 1 year |
| Enrolment data (years) | Unlike attendance data, enrolment data is not used for historical analysis. Keeping it for more than 2 years is counter-productive. | 2 years | 1 year |
| Financial - receipt & fee data (years) | The commercial norm of five years is sufficient. | 5 years | 1 year |
| Persons not financial (years) | Keeping participant information on file may assist if the person decides to rejoin in a future year. This should be weighed against the privacy implications of maintaining personal data for non-members. | 2 years | 1 year |
| Registrations never completed (days) | The number of days to keep a registration for which membership fees have never been paid. | 60 days | 30 days |

The Terms & Conditions tab

Use the Rich Text Format (RTF) editor to enter your U3A group's 'Terms and Conditions. **Hint**: it might be easier to use a Word processor such a *Microsoft Word* to do this and copy and paste the result.

If entered, your members will be required to agree to these terms on a regular basis. The Terms & Conditions will be displayed in the *Member Portal* and the member will be required to accept them using an *Accept* button. If the member does not accept the T&C's they will be logged out until they do.

The Multi Campus tab

This tab provides the options to allow your U3A to accept courses offered by other U3A groups (campuses) using the U3Admin system, and allows your U3A the ability to offer courses to other campuses. This facility is known as the **Multi Campus Extension** to the U3Admin system.

To opt-in to multi-campus extensions, tick the **Allow Multi-Campus Extensions** checkbox. The system will display two lists...

1. **U3A Not Allowed**. Those U3A you do not wish to accept courses from, and
2. **U3A Allowed**. Those U3A you do not wish to accept courses from.

There could be any reason why you do not wish to allow a particular U3A. However, it is anticipated the most common reason will be that distance prohibits a reciprocal arrangement.

That's it! Courses offered by other U3A will now appear in your *Class Schedule*. Your members may request enrolment and will or will not be accepted by the offering U3A.

To offer a course to other U3A, go to [Add/Edit Courses](#Add_Edit_Courses603B9451) and identify those courses you wish to offer. Once the schedule cache is updated, your courses will appear in their *Class Schedule*.

## Membership Fees

This procedure defines the fees payable by members for the current year. It also defines the fees waived for complimentary members.

A member may optionally be charged a postal surcharge. This is the fee charged if the member chooses not to receive correspondence via email.

The system has the concept of a **Financial Member**, being a member that has paid their membership fee plus the postal surcharge if applicable, for the current year. If a member is not financial they are not permitted to enrol in a class. If such an attempt is made, they will be wiatlisted. A current financial member becomes not financial when fees for the new year are not paid.

The current year is determined by the current term as defined in [Add/Edit Enrolment Terms](#Add_Edit_Enrolment_TermsFA85892B).

The membership fees record has the following fields...

Fee Parameters

| **Field** | **Description** |
| --- | --- |
| Full Year Membership Fee | The fee charged to continuing members and new members joining in Term 1. |
| Term 2 Joining Fee | The fee charged to new members joining in Term 2 |
| Term 3 Joining Fee | The fee charged to new members joining in Term 3 |
| Term 4 Joining Fee | The fee charged to new members joining in Term 4 |
| Mail Correspondence Surcharge | Optional. The fee charged if the participant chooses postal correspondence rather than email. |

Eway Merchant Fee Parameters

| **Field** | **Description** |
| --- | --- |
| Separate merchant fee from U3A Fee? | Tick if you require the member to be charged merchant fees in addition to the U3A fee.  Leave un-ticked if merchant fees are to be included in the U3A fee.  For example, member fees are $50 and the merchant is $1. If ticked, the member will be charged $51.00, otherwise the member is charged $50 only. |
| Merchant Fee fixed amount | The base fee charged by Eway. At the time of writing this is $0.25. |
| Merchant Fee percent amount | The percent of the amount charged by Eway. At the time of writing this was 1.5%. |

Complimentary Parameters

| **Field** | **Description** |
| --- | --- |
| Include membership fee in complimentary | Tick if membership fees are to be waived for complimentary members. The default is ticked. |
| Include Mail Surcharge in complimentary | Tick if the mail surcharge are to be waived for complimentary members. The default is ticked. |
| Include Course Fees Per Year in complimentary | Tick if course fees per year are to be waived for complimentary members. The default is not ticked meaning the fee will be charged. |
| Include Course Fees Per Term in complimentary | Tick if course fees per term are to be waived for complimentary members. The default is not ticked meaning the fee will be charged. |
| Maximum Leader Enrolments in complimentary | Enter the number of courses a leader is permitted to enrol before membership fees are charged. If a leader enrols in fewer courses than the value entered, that leader is awarded complimentary status when [Complimentary Membership](#Complimentary_Membership1FFA276D) is executed and the *Assign to Course Leaders?* check box is ticked.  If 0 or an impossibly high number is entered, a leader will always be awarded complimentary status if *Assign to Course Leaders?* is checked in [Complimentary Membership](#Complimentary_Membership1FFA276D).  **Note**: This field implements a known business rule that exists in some U3A. If your U3A does not currently implement this rule, it is recommended that you do not introduce it. That is, set this field's value to zero. |

## Add/Edit Document Templates

A **Document Template** defines a document or part of a document that will be posted, emailed or SMS'ed to U3A participants. Templates are not only designed to reduce the effort in creating a document but also to provide a standard by which your email and other documents are written.

A template text used to create a final document may be changed and added to when the final document is written. Therefore, keep your templates general rather than specific unless you are creating a template for a repetitive document. Common items found in a template might be...

1. Initial font and style
2. Header text including the U3A logo
3. Signature

Examples of repetitive emails are...

1. A welcome email to new members from the president and/or committee.
2. A reminder that next year's fees are due.
3. A notice of suspension or termination of membership.

This procedure uses a modified version of the rich text editor component supplied by DevExpress Inc. For for details to its use please refer to [DevExpress web rich text editor](https://devexpress.github.io/dotnet-eud/interface-elements-for-desktop/articles/rich-text-editor.html)

The template record consists of the following fields...

| **Field** | **Description** |
| --- | --- |
| Template Type | Select to type of document to be created...   * Email * Postal * SMS * Enrolment Subdoc * Receipt Subdoc   The enrolment and receipt sub-documents allow the creation of sub-documents that contain the parent-child relationship with the main document. These options are an advanced topic and rarely used. |
| Template Name | Enter a name that uniquely describes the document. |
| From (11 chars max) | SMS only. Enter text that will be displayed instead of your phone number. **Note:** The Australian Government now requires all such text to be registered. This is done via the SMS service provider. |
| Subject | Email Only. Enter a subject for the email. |
| Preheader | (Optional) The email Preheader is a short message displayed in the email inbox immediately below the Subject line. Use wisely to significantly increase the likelihood of an email being opened and read. |
| From Email Address | Email only. Enter or select the address from which the email is being sent. **Important:** This address must be from your U3A's registered domain.  The from address may be a non-existent address such as, *no-reply@myU3A.org.au*. However, to ensure high email reputation, such addresses should be used sparingly. |
| From Display Name | Email only. Enter the name to be displayed in the *From* field on the recipient's email. |
| Document Body | Enter and format the document's text.  **Hint:** The editor provided is sufficient for simple text entry. For complex formatting tasks we suggest the document be created in Microsoft Word or equivalent and then copy and pasted into the document body. |

## Restore Deleted Courses

A **Course** consists not only the course record itself, but also its class, enrolment and attendance records. Accidental deletion can therefore result in a significant loss of work.

Rather than physically deleting a course record from the database, a technique known as a soft delete is used. We simply identify or flag the record as no longer required and then ignore it when reading records from the database. In other systems, you might recognise this as moving the item to trash. The advantage of this technique is that it is a simple matter of removing the deletion flag to reinstate or restore the records.

This procedure restores Course records previously deleted in the system.

To restore, select the required records from the grid. Then click the **Restore Courses** from the grid's toolbar.

## Restore Deleted Participants

A **Participant** consists not only the participant record itself, but also its enrolment, receipt and fee records. Accidental deletion can therefore result in a significant loss of work.

Rather than physically deleting a participant record from the database, a technique known as a soft delete is used. We simply identify or flag the record as no longer required and then ignore it when reading records from the database. In other systems, you might recognise this as moving the item to trash. The advantage of this technique is that it is a simple matter of removing the deletion flag to reinstate or restore the records.

This procedure restores participant records previously deleted in the system.

To restore, select the required records from the grid. Then click the **Restore Participants** from the grid's toolbar.

# Course Menu

Define your course curriculum for the current or next year.

* [Enter / Exit Maintenance Mode](#Enter___Exit_Maintenance9ED450CD)
* [Add/Edit Course Types](#Add_Edit_Course_Types89B21DA2)
* [Add/Edit Venues](#Add_Edit_Venues29A120DB)
* [Add/Edit Enrolment Terms](#Add_Edit_Enrolment_TermsFA85892B)
* [Add/Edit Public Holidays](#Add_Edit_Public_HolidaysF806CEA4)
* [Add/Edit Courses](#Add_Edit_Courses603B9451)
* [Bring Forward Courses](#Bring_Forward_Courses147225FD)
* [View Multi-Campus Offers](#View_Multi_Campus_Offers66E0EB3D)
* [Cancel Class](#Cancel_Class6132D31D)
* [Course Schedule](#Course_Schedule5DF4033D)

## Enter / Exit Maintenance Mode

Member Portal Maintenance Mode prevents members from accessing Member Portal functions while major restructuring of data is being undertaken. In particular, this mode should be used when you are making preparations for the new U3A year.

The advantage of Maintenance Mode is that member transactions (cash receipts, enrolments etc.) do not have to be recreated in the event of a data catastrophe and database restore. You need only be concerned with the work that has been done on the administrative website.

To enter Maintenance Mode, enter or confirm the approximate date and time the system will be in maintenance mode for and click the red button.

To exit Maintenance Mode, re-enter this procedure. The button will now be coloured green. Again, click it to exit.

## Add/Edit Course Types

A **Course Type** categorizes Courses & Activities into groups. Common Course Types might include...

* Art
* Exercise
* Games
* Social

Each course type record also contains a **Short Name** field. A short name has a maximum of 15 characters. The short name is used on system graphics where screen space is at a premium.

Once created, a Course Type may not be deleted. If a Course Type is no longer required, tick the *Discontinued* check box.

## Add/Edit Venues

A **Venue** defines a location in which a Course or Activity is held. Every course requires at least one venue but may have multiple, one per class.

A venue record must have a unique Venue Name and, preferably an address. All other fields on the record are for informational purposes only and are not used in any system calculations.

U3Admin uses Google Maps to display the location of venues to course participants. If the venue is not a physical location, for example an online meeting, leave the *Can Map Address* check box blank.

Once created, a Venue may not be deleted. If a Venue is no longer required, tick the *Discontinued* check box.

## Add/Edit Enrolment Terms

A **Term** is the period of time in which course, classes and other activities normally occur. Every class must be assigned at least one Term and may be assigned up to four in any one year.

If a class or activity occurs during a term break it is assigned to the term immediately preceding it. For example, If an activity occurs during the Term 1 to Term 2 break, it will be assigned to Term 1.

To create a set of terms for the new year, click the **Create/Edit New Year** button. This will create a set of terms for the new year providing a "best guess" of your terms' start date and duration. These may be edited by changing the values displayed in the grid. When complete, click the *Save* button and the software will calculate the set of enrolment dates and duration fro each term.

Once created, a Term cannot be deleted.

The Term record contains two important sets of dates...

1. **The Term Start & End.** The start date is always a Monday. The end date is a calculated variable being the start date plus the number of weeks in the term as entered by you.
2. **The Enrolment Start & End.** This is the date range in which new student enrolments will be assigned to the term. Typically, an enrolment period will start one week prior to the end of the previous term and end one week prior to the end of the current term. Thus there will be no break from one enrolment period to the next.

However, although not encouraged, you are allowed to create a break in the enrolment period where the start of a new period does not begin immediately after the end of the last. A break does not allow members to enrol via the Member Portal and is intended to allow administrators time to finalise course/enrolment details prior to the start of a new period.

A timeline is provided within the procedure to assist in visualising term dates within the year.

At any one time there is one and one only *Default* or *Current* term. Normally, this is set automatically after the last course for the term is complete. However, it can also be set manually by ticking the *Is this the current term?* check box.

## Add/Edit Public Holidays

Classes are not held on **Public Holidays**. They will be marked as canceled on the *Course Schedule*.

To create a list of Public Holidays, click the *Rebuild the List* button. This will retrieve the list of holidays for your state which is maintained by the Australian government. This procedure should executed once per year but may be executed as often as required. Delete any public holiday in which classes will be held. For example, the NSW Bank Holiday.

The Membership Coordinator will be reminded of public holidays up to seven days in advance via email. Again, if classes are to held, delete the public holiday.

## Add/Edit Courses

A **Course** is an activity organised by the U3A group.

A course may have one to three ***Leaders****,* and as many ***Students***enrolledas allowed. In addition, the course may have a ***Guest Leader*** which is a leader that is not a financial member of the U3A group. Leaders may assign ***Course Clerks*** from the enrolled students to assist with administrative tasks.

A course may have one or more classes. A **Class** defines the time and place a course is held. It contains parameters that determine when it occurs and how it recurs. Students are enrolled into the class, not the course. Therefore, enrolment is not permitted into a course unless at least one class is defined.

You may define a Course as an **Off-Schedule Activity***.* This is an internal or private activity that is not displayed on the Class Schedule and cannot be enrolled into via the member portal. Such activities might include committee meetings, cleaning rosters, venue hire etc. Another use might be to hide the course until an enrolment window opens or until course details are confirmed.

Those with access to the *Administrative Portal* may enrol participants in Off-Schedule Courses. Participants enrolled in these courses will be able to view those enrolments via *View your course enrolments* on the Member Portal.

Alternatively, a course may be defined as a **Featured Course**. Featured courses are highlighted as such and are always displayed the top of the *Course Schedule*. Featured courses should be kept to a minimum and reviewed regularly. Otherwise, their impact may be reduced.

A course and its associated class(es) can be deleted. However, this should be avoided once there are enrolments and/or attendance details. Deleting a course will delete all enrolment and attendance detail associated with it.

**Hint:** Check the Current Year

Before you create/edit courses please ensure you are working in the correct year. The year is displayed on the top right hand corner above the grid. Click the button titled, *Change Year* to change. Note that terms for the new year must be created via [Add/Edit Enrolment Terms](#Add_Edit_Enrolment_TermsFA85892B) before you can do this.

Rebuild Cache button

The system employs a cache to display the *Class Schedule*. Using a cache of pre-calculated data to display the schedule saves time and improves performance on the most used and calculation intensive process in the system. The cache is rebuilt automatically every hour. If you make changes to course/class details you may optionally click the **Rebuild Cache** button to rebuild the cache immediately.

Preview Enrolment List button

Click this button to preview all classes as seen by members making enrolments via the *Member Portal*. It is anticipated that this preview will be useful when the current enrolment period is undefined.

Course Edit Views

When adding and editing course data, you have the option of choosing between one of three views...

1. **Simple View**. This view presents the course and class data as one form. When creating a new course the *Occurrence* will be set to **Weekly**. It is anticipated that this view will be suitable for most U3A courses.
2. **Activity View**. This is a slight variation on the *Simple View* specifically intended for activities and events that occur once only. Therefore, when creating a new course the *Occurrence* will be set to **Once Only** and the *Start Date* displayed.
3. **Detail View**. A detail view in which all fields are displayed and provides the ability to create multiple classes per course. While being the most complex of all views, it is also the most flexible and comprehensive.

In addition, all views contain a **Settings** tab. This allows you to override default system settings as defined in [Organistaion Details](#Organistaion_DetailsFE7141D5). It also allows you to offer your selected courses to other U3A using the system's **Multi Campus Extensions**.

**Some Notes**

* A view is persisted with course data. That means the view that was active at the time a course record is written to the database will be used when that data is subsequently retrieved from the database.
* Views are organised via a tabset at the top of the edit form. A view can be changed at any time by clicking the tab desired. The two exceptions to this are
  + a course with multiple classes which is always displayed as a *Detail* view.
  + If a course is created in Simple or Activity view it cannot be changed to Detail view until after the course is saved.
* A view is simply a means of displaying course data. All course records have the same data structure "under the hood". It is therefore permissible to select and/or change the best view for the course you are implementing.
* The *Simple* and *Activity* views contain a **Show Details** checkbox on the Class group of fields. Ticking this field will display all fields for the class.

Changing class schedule parameters

The dates on which a class is held is a calculation based on parameters stored on the Class record (see below). These parameters are...

* 1. Term offered
  2. Start Date
  3. Recurrence
  4. Occurrence
  5. On Day
  6. Start Time

Changing any one of these values will cause the following system operations...

1. The operator will be warned of the changes to occur and be given the opportunity to cancel the operation.
2. The system will delete any attendance records from the current date forward. They will be re-created according to the new schedule parameters.
3. Existing attendance records prior to the current date will be left intact and with the previous schedule parameters.

It is safe to change class schedule parameters as the deletions only affect **future** attendance records and in most cases there will be none. Student leave & cancelled class records are not affected.

 The Course Record

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| When you add/edit a course, the course record will be displayed as a pop-up window. This record is composed of two sections...   1. The course details section. The course section consists of two tabs...    1. *Course Details*. The primary fields required to define a course, and    2. *Settings*. Values that override settings entered in [Organisation Details](#Organistaion_DetailsFE7141D5) 2. The class grid, into which one or more classes may be added and/or edited.   Use the course details to enter the basic course details.   |  |  |  | | --- | --- | --- | | **Field** | **Description** | | | **The Course Details tab** | | | | Featured Course | Tick is this is to be a featured course. A featured course is highlighted on the *Class Schedule* and highlighted. Featured courses should be kept to a minimum and reviewed regularly. Otherwise, their impact is reduced. | | | Off-Schedule Activity | Tick if this is an internal or private activity that   1. will not be displayed on the Class Schedule report, and 2. enrolment via the *Member Portal* is not permitted. | | | Course Number | Optional. A number unique to the course. Note that course numbers are not a requirement in the system. They are provided to maintain compatibility with legacy systems. | | | Participation Type | Required. This option only has effect when a course has multiple classes. Select either...   1. Same participants in all classes, or 2. Different participants in each class.   For example,   * A walking group meets three times per week. The same students attend each walk. Select option 1. * An art class is very popular. It is decided to hold the same class three times per week but each class will have a different group of students. In this case, select option 2.   **Rules:** The followings rules apply when changing the *Participation Type...*   1. If the course has only one class, no warning is generated. The system performs the change without further ado. 2. If you change from **Different participants in each class** to **Same participants in each class** no warning message is generated. The system will move the class enrolments to course enrolments deleting any duplicate students. 3. If you change from **Same participants in each class** to **Different participants in each class** a message will be generated warning you that the system will move the course enrolments to the first class in the course. It is up to you to then transfer students from that class to other classes, if required. This can be done via [Enrol Participants](#Enrol_Participants6C90983F). | | | Course Type | Required. Select a course type from the drop-down list. | | | Course Name | Required: A name that (should) uniquely describe the course. | | | Description | Optional. Describe the course in a little detail to give potential enrolees sufficient information to make their decision. Try not to be too verbose as it can impact system performance over slow Internet connections. | | | Additional Information URL | A web link URL that provides additional detail about the course. This link must be fully qualified meaning it must start with https:// or http://. It is recommended that a URL shortcut be used if the web link URL is long, for example [Tiny URL](https://tinyurl.com) | | | Class Duration | Required. The length of a class in hours and fractions of an hour. For example, a class that will last for 1 hour and 15 minutes will be entered as 1.25. | | | Required Students | Required. The number of students required for the class to proceed. This field is for information purposes only as the software currently does not take any action if a class falls below the minimum. | | | Maximum Students | Required. The maximum students allowed in a class. A student will be *Waitlisted* if an attempt is made to enrol in a class that has enrolments equal to or greater than this value. | | | Auto Enrol? | Required. Automatic enrolment is the process of moving students from the waitlist to enrolled should places be or become available. It is a process that either occurs immediately on enrolment if the member is financial, or automatically overnight. Uncheck this option if auto enrolment is not to occur.  For example, the leader of the yoga class requires that all students have a minimum level of fitness before attempting the class. In this case, *Auto Enrol?* will be unchecked and students moved off the wiatlist manually as they prove their fitness.  All course/classes with *Auto-Enrol?* unchecked will be identified as **Closed** in member enrolment. | | | Disallowed Reason | This field will be enabled if the *Auto Enrol?* field is un-checked. It allows the entry of a reason that is displayed on the *Class Schedule.* If left blank, *Class is Closed* will be displayed. A maximum of 50 characters only is allowed. | | | Course Fees | Course fees are once-only fees typically payable on enrollment into a course. Course fees are in addition to membership fees. | | | Course Fee | Enter the fee as dollars and cents. | | Fee Description | Enter a brief description of the fee. | | Date Due | Normally, a course fee is payable on enrollment into the course. Alternatively, enter the date on which the fee becomes due & payable. | | Override Complimentary? | Tick if you wish complimentary members to pay the fee. | | Leader Pay Fee? | Tick if you require leaders to pay the fee. | | Term Fees | Term fees may be added on a per term or per year basis. Term fees are in addition to membership fees. | | | Course Fee | Enter the fee as dollars and cents. | | Fee Description | Enter a brief description of the fee. | | Due Date Adjust (weeks) | Normally, a term fee is payable at the start of term. Alternatively, enter the the number of weeks prior to or after the start of term at which the fee is payable.  A negative number represents the number weeks prior to the start of term a fee is due & payable.  A positive number represents the number weeks after the start of term a fee is due & payable. | | Override Complimentary? | Tick if you wish complimentary members to pay the fee. | | Leader Pay Fee? | Tick if you require leaders to pay the fee. | | **The Settings tab** | | | | Send Leader Reports To | Determines the recipients of leader reports sent automatically overnight...   1. **Leaders, if none then clerks.** Leader reports will be sent to leaders. if there are no leaders with visible email addresses then the reports will be sent to clerks. 2. **Clerks, if none then leaders.** Leader reports will be sent to clerks. if there are no clerks with email visible addresses then the reports will be sent to leaders. 3. **Both**. Leader reports will be sent to both leaders and clerks with email addresses.   **Note:** This field overrides the value in [Organistaion Details](#Organistaion_DetailsFE7141D5). Leave blank to use the default value. | | | Course Contact Order | Defines the order in which a course contact is determined. This field overrides the value entered in [Organistaion Details](#Organistaion_DetailsFE7141D5). The options are...   1. Leaders then clerks, or 2. Clerks then leaders   Class contacts can either be leaders or clerks all of which are optional and some may have requested their contact details to be silent. The software will therefore choose the contacts based on the order selected and who do not have their contact details silenced. | | | Exclude course from leaders complimentary count? | The system allows for membership fees to be waived if a leader is enrolled as a student in less than a defined count of classes. Tick this field if the course is not to be included in that count.  For example, special excursions and paid activities would normally be excluded from the count. | | | Allow Multi-Campus Enrolment From | Enter the date from which you wish to offer this course/activity to other U3A groups. Note that this field will only be enabled if...   1. the **Allow Multi-Campus Extensions** checkbox in [Organistaion Details](#Organistaion_DetailsFE7141D5) is ticked, 2. The course has no fees, 3. The course participation type is *Same participants in all classes*, 4. There is only one class in the course, and 5. The course is offered in one term only.   As such, it is anticipated that most multi-campus courses will be once-only activities such as Guest Speakers. | | |

 The Class Record

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Use the add/edit/delete on the Class grid within the Course record pop-up to create and /or edit classes. Enrolment cannot occur until a course has at least one class assigned.   |  |  | | --- | --- | | **Field** | **Description** | | Term (1, 2, 3 & 4) | A class must be assigned at least one term and may be assigned up to all four.  If a class occurs during a term break it is assigned to the term immediately preceding it. For example, If a class occurs during the Term 1 to Term 2 break, it will be assigned to Term 1. | | Guest Leader | Optional. A class may have a Guest leader, that is one that has not been entered as a participant in [Add/Edit Participants](#Add_Edit_Participants5E221E07). A Guest Leader is for information purposes only. It is strongly recommended that a class with a Presenter also have a participant leader to receive email etc. Most often this might be the Course Clerk or an activities officer. | | Leaders 1, 2 & 3 | Select the leader from the drop-down menu. A class may have up to three leaders. Note that a leader is not considered a student and therefore not included in the enrolment count. | | Venue | Select the venue from the drop-down list. | | Start Date | Optional. Enter the course start date, if required. By default it is left blank meaning the first class will occur on or after the start of term on which the *On Day* day occurs (see below). | | Recurrence | Optional. Enter how many times the class will recur. By default it is left blank meaning the course will recur till the end of term.  **Note:** A class should have a *Start Date* if it has a *Recurrence* value. Leaving the Start Date blank or null causes it to be set to the term's Start Date with every new term. This can cause issues with classes that recur (repeat) past the end of term.  For example, if a class occurs Monthly and recurs (repeats) 10 times, the expectation would be that it starts in February (term 1) and continues till November. However, if the Start Date is left blank (null), then it is set to the start date of the current term. This would mean that if term 4 starts in October, the class will not finish till 10 months later in July the following year. In addition, there will be multiple classes calculated that overlap in terms 2, 3 and 4. | | Occurrence | Select from the list how the class occurs. The default value is *Weekly* meaning the class will occur once per week. | | On Day | Select the Day on which the class is held. If a *Start Date* has been entered above, the *On Day* value will be automatically calculated. | | Start Time | Enter the Start Time of the class as hours and minutes. | |

 The Class Link

|  |
| --- |
| The class link is an internet address that allows a member to quickly enrol in a class. The link is intended to be used in email and other documentation to be sent to members or otherwise available in report form. By clicking on the link or scanning a QR Code created from the link the member will be enrolled in the class.  Create a link  To obtain a Class link...   1. On the grid in [Add/Edit Courses](#Add_Edit_Courses603B9451), find the required Course. 2. Click the arrow button to the left hand side of the Course record. This will display the Class record(s). 3. Again, click the arrow to the left hand side of the Class record. This will display the Class link. 4. Click the Copy button to copy the link to the clipboard.   Using the link  Using the copied link depends on the document you are creating. To add the link to an email created within the administrative portal...   1. Create your email document as usual via the [Communicate](#Communicate) button. 2. Position the mouse pointer where you require the link to be inserted. 3. On the document menu, select **Insert | Hyperlink**. A popup dialog will appear. 4. Paste the saved link into the into the URL field. 5. Enter the hyperlink's *Text* and *Tooltip* and click the Save button.   To create a QR Code in a Word document...   1. Position the cursor in the document where you wish to insert the QR Code. Press **Ctrl + F9**. A pair of curly braces {} will appear in the document. 2. Within the braces, type   DisplayBarcode <paste link> QR \s 100   1. When complete, right-click the field and select *Toggle Field Codes*. This will display the QR Code.   Note: The \s value is a percentage value from 10 through 10000. It determines the size of the QR Code. |

## Bring Forward Courses

A course exists for a year. Courses for a new year must be created prior to the commencement of enrolment for that year.

**Bring Forward Courses** reduces your workload by automatically copying courses from the current year into the next. It is therefore a first step in preparing for the new year.

However, before using this procedure, you should ensure [enrolment terms](#Add_Edit_Enrolment_TermsFA85892B) for the new year have been created.

Select the courses to be copied by ticking the check box on the left side of the grid. *Hint:* Use the check box in the header to select/un-select all. Then, click the *Create Courses* button to create the selected courses in the new year.

This procedure may be executed as many times as required. Duplicate course records will not be created.

Once copied, courses for the new year may need to be edited. Please ensure you have selected the correct year before editing. Refer to [Add/Edit Courses](#Add_Edit_Courses603B9451).

## View Multi-Campus Offers

This procedure lists classes offered to your members by other U3A groups (campuses).

Be aware that entries in this list are updated every hour. Class numbers (enrolled or waitlisted) are always accurate.

If you do not see courses listed that you would otherwise expect to see, ensure the U3A in question is listed in the allowed grid on the Multi-Campus tab in [Organisation Details](#Organistaion_DetailsFE7141D5).

## Cancel Class

**Cancel Class** allows the cancellation of a class for one or a range of dates.

The Cancel Class form consists of two tabs. The first, titled *Cancel Class* allows the creation, edit and/or of a new or existing cancellation.

The second tab, titled *Current Cancellations* is a summary grid of cancellations for the current term. Items on this grid may be edited or deleted only.

To create a cancellation, select the term, course and class to be cancelled. Then click the grid's *Add* button or the *Add Cancellation* toolbar button. Enter the date range and reason for cancellation in the pop-up form.

*Hint:*

1. If the cancellation extends over multiple weeks, it is more efficient to create a single record with a date range than multiple records with the start and end dates equal.
2. You do not have to match your cancellation with the course dates. For example, if a leader is to be on holiday from 2nd June to the 27th July inclusive, enter the cancellation with those dates. Any class within those dates will be cancelled.
3. If the course is to be cancelled for the remainder of term/year, it is simpler to uncheck the relevant Term(s) in [Add/Edit Courses](#Add_Edit_Courses603B9451).

## Course Schedule

The **Course Schedule** displays a calendar of classes in a graphical format. It is especially useful to review the courses created/edit in [Add/Edit Courses](#Add_Edit_Courses603B9451)

To view the calendar, click the *Process*  button. You may optionally filter the venues displayed by selecting from the *Filter By Venue* list or change the displayed term from the default or current term. In either case you must re-click the *Process* button to retrieve your required data.

By default, the schedule is displayed as one work week (Monday to Friday). This may be changed by clicking the buttons to the right on top of the graphic.

Also, the graphic by default displays the schedule for the current week. You can select a specific date or move next/previous using buttons to the left and on top.

Click an individual class to display a pop-up with further details.

**Hint:** Find conflicting venues

Filter by a single venue. Any classes with overlapping times will be displayed next to each other. These are classes with conflicting times.

# Participation Menu

Members, contact, enrollments and more!

* [Fees & Receipting](#Fees__Receipting29A00D07)
  + [Bank Data Import](#Bank_Data_ImportBD8D2607)
  + [Add/Edit Receipts & Refunds](#Add_Edit_Receipts228A25EE)
  + [Add/Edit Fees & Credits](#Add_Edit_FeesC51AA304)
  + [Review Online Payment Status](#Review_Online_Payment_StatusA7147A02)
  + [Complimentary Membership](#Complimentary_Membership1FFA276D)
  + [Financial Status Enquiry](#Financial_Status_EnquiryC4D5BBD4)
  + [Course Fess Due Enquiry](#Course_Fess_Due_ReportC9E5FBCD)
* [Add/Edit Participants](#Add_Edit_Participants5E221E07)
* [Add/Edit Contacts](#Add_Edit_ContactsECFE2866)
* [Add/Edit Committee](#Add_Edit_Committee1A4831A2)
* [Add/Edit Volunteers](#Add_Edit_Volunteers56664DC8)
* [Enrol Participants](#Enrol_Participants6C90983F)
* [Review Class Dropouts](#Review_Class_DropoutsAC42D39E)
* [Class Attendance](#Class_Attendance0099DC9E)
* [Lucky Member Draw](#Lucky_Member_DrawBD0E4B4E)
* [Bring Forward Enrolments](#Bring_Forward_Enrolments01A6E496)
* [Auto Enrol Participants](#Auto_Enrol_ParticipantsC8FFD4C5)
* [Correspondence Hub](#Correspondence_Hub9528C372)
  + [Queued Transactional Email](#Queued_Transactional_Email2228B24E)
  + [Queued Broadcast Email](#Queued_Broadcast_EmailB00892CE)
  + [Queue Leader Reports](#Queue_Leader_Reports2FC394C7)
  + [Statistics/Bounces](#StatisticsBonuces)
  + [Search](#Search)
  + [Suppressions](#Suppressions)

## Fees & Receipting

Enter topic text here.

### Bank Data Import

**Bank data import** is the process of importing bank cash receipt details and assigning those receipts to the members that paid them. Importantly, bank data import is only required for those members that paid their fees via their banking software, cash or cheque. It is not required for those members who paid their fees via the Eway online payments system. Any receipts paid via Eway must be ignored in this procedure.

Before you begin

To use this procedure you must have access to the U3A's banking software or be provided with a file by somebody that does. The file required is known as an **OFX** or **QIF** file. These files a very specific file format and is supported by all major Australian financial institutions.

Normally, when you request this file you will be given the ability to enter a date range. We suggest the start date be one day after the last file import and the end date be no later than yesterday's date.

**Important**

*During data import, the software will attempt to match receipts to participants (members). This is done by extracting the member's name from the transaction's description. At best, this procedure is problematic. Therefore,*

***All receipt transactions & their assignment must be checked carefully for accuracy.***

File Formats

You can import bank data files with file extensions of OFX or QIF...

1. OFX is a *Financial Data Exchange* formatted file.
2. QIF is a file formatted in the *Quciken Interchange Format*.

**Why multiple formats?**

For many years QIF was the de facto standard for the electronic transfer of financial data.

OFX is the new kid on the block & is a far more sophisticated specification.However, OFX files require a very strict adherence to specification. We have noticed some banking software does not conform and therefore creates errors on import. In addition some banking software simply does not support the OFX format.

**Which format should I use?**

If OFX is available then use it. If it causes errors on import then switch to QIF.

Note that some banking software will give you a choice of QIF formats. For example, the Commonwealth Bank’s Netbank software provides…

1. QIF (US)
2. QIF (AUS)
3. QIF (MYOB)

If given a choice, use the Australian format.

Screen Layout

The procedure's user interface consists of three sections...

1. On the top-left corner is the **file upload dialogue**. Use this dialogue to select the file to be imported into the system.

2. On the top-right corner is the procedure's **command buttons**. These give you access to the *actions* performed by the procedure.

3. Underneath items 1 and 2, is the **display grid**. This displays the transactions entered and provides the ability to manually assign a receipt to a member.

The current financial year will be displayed in the **command button** section. Always check to ensure you are working in the correct financial year. if it is incorrect, click the *Change Year*button and select the year required.

The other buttons available are...

1. **Apply Payments to Participant records**. When you are satisfied that all imported transactions are correctly assigned to participant records, click this button to apply the transactions and finalise the procedure.
2. **Show all bank transactions**. Normally, only receipt transactions are displayed. Click this button to show all transactions in the import file.
3. **Clear bank import file**. This option will delete the OFX/QIF file from the system. It is intended to be used if a mistake was made when importing the file. An incorrect date range, for example. The original bank import file will remain intact on your client PC.

The **display grid** has the following columns...

| Column | Editable | Description |
| --- | --- | --- |
| On File? | No | A checkbox to indicate the receipt has already been processed by the system in a previous import. This will occur if your OFX/QIF file's date range overlaps with a previous import. |
| Date | No | The date received/processed by the U3A's financial institution. |
| Name | Yes | The participant (member) to whom the receipt has or will be assigned. |
| Amount | Yes | The amount received. |
| Financial To | Yes | The member's new Financial To year. This field can be set to the previous financial year, meaning the member is not financial or the current financial year, meaning the member is financial. |
| Terms Paid | Yes | The term to which the member is financial. If left blank, the member is financial for the full year. If set to a value, the member is financial to that term. Thus, if set to 2 the member is financial in terms 1 and 2 of the financial year but not terms 3 and 4.  Note that this column is only displayed when *Member Fee Payment Type* is not set to **Full Year Only** in [Membership Fees](#Membership_FeesD7AD44D4). |
| Description | Yes | The description of the transaction. Most often this is text entered by the participant when the payment was made. |
| Identifier | Yes | Most often not used. |

How to import a file

**Note:** Always choose the Australian file version if you are importing a QIF file and your banking software provides a choice of files.

1. Using your U3A's banking software, download the OFX or QIF onto your PC. It will normally be placed in your *Downloads* folder.
2. Using the **file upload dialogue**, import the file into the system. You can do this in one of two ways...
   1. Drag the file from your operating system's file manager (File Explorer, for example) and drop onto the **file upload dialogue**, or
   2. Click the *Select File* button to open a standard operating system file open dialogue, navigate to and select the file required.

Once selected, the system will upload the OFX or QIF file onto the U3Admin server and process it. The results will be output into the **display grid.**

Assigning Receipts

The import process will make a "best guess" at assigning receipts to participants. The process is not perfect and quite often you will need to correct the automatic assignment.

Click the edit (pencil) button on the grid row you wish to change. Select the required member from the drop-down list on the *Name* column. When you are satisfied that all is correct, click the Save (disk) icon on the grid row. Your changes are now saved. Repeat for all receipts to be assigned.

Completing the import

When you are satisfied that all rows are correct (or, correct as can be), click the button, **Apply Payments to Participant records.** This will finalise the procedure and return you to the main menu.

Exit without applying payments

It is safe to exit the procedure without applying the payments to participant records. When you re-enter the procedure all transactions will be displayed in the grid exactly as you have left them.

### Add/Edit Receipts & Refunds

Cash receipts are normally applied to participant records either automatically when the Eway online payment gateway is used or manually when the participant pays via some other payment method, cash, cheque or direct payment.

This procedure should therefore be rarely used. Its primary purpose is to re-assign receipts that have been incorrectly applied to the wrong participant or to split a receipt amongst multiple participants. The procedure may also be used to edit the participant's *Financial To* year.

At all times, the total money received must match your banking records. Receipt transactions should only be edited or deleted when money has been credited back to the participant.

Financial Status - Add/Edit

Using this procedure, you may *Set* or *Reset* a participant's Financial Status.

1. **Set Financial Status**. If the participant's Financial To year is prior to the current Processing Year, you will be presented with a check-box asking if the Participant's Financial To year is to be set to the current Processing Year. Tick this check-box to update the Financial To year. This will make the participant a financial member of the U3A.

Note that by default, this check-box is automatically ticked if a new receipt is created.

1. **Reset Financial Status.** If the participant's Financial To year is equal to the current Processing Year, you will be presented with a check-box asking if the Participant's Financial To year is to be reset to the Processing Year - 1. This will make the participant not financial in the current year.

If you edit a receipt and change the participant, you will be presented with two check-boxes. The first will ask if the new participant is to have their Financial To year set to the current processing year and the second will ask if the previous participant's Financial Year is to be reset to the previous processing year.

Financial Status - Delete

If you delete a participant's receipt, you will be asked if you wish to also reset the participant's Financial To year. You have three choices...

1. Click **Yes**. The receipt will be deleted and the participant's Financial To year is reset.
2. Click **No**. The receipt will be deleted but the participant's Financial To year will remain as is.
3. Click **Cancel**. No action is taken. The receipt will not be deleted and the Participant's Financial To year will remain as is.

The receipt record

| Field | Description |
| --- | --- |
| Received From | Select the participant from whom the money was received. |
| Date | Enter or select the date the money was received. This should match your bank statement. |
| Description | Briefly describe the transaction. |
| Indentifier | (Optional) May be used to provided additional detail to explain the transaction. |
| Amount | Enter a positive number to create a payment receipt, or a negative number to create a refund. |

### Add/Edit Fees & Credits

A participant's membership & course fees are automatically calculated by the system. Fee and/or credit amounts entered or edited by this procedure are therefore by definition, *adjustments* to those fees.

This procedure allow you to make changes to calculated fees and credits without deleting those fees or credits or altering member payment receipts. They therefore maintain a history of fee/receipt records providing a complete explanation of the circumstance under which the transactions were created.

For example, a member has paid their fees in full for the current year. The U3A committee decides to make that member complimentary and the treasurer reimburses the member their fees. To account for this in the U3Admin system, you may...

1. Delete the original receipt via [Add/Edit Receipts](#Add_Edit_Receipts228A25EE), or
2. Add a negative fee adjustment using this procedure.

The issue with option 1 is you will lose the transaction history or *audit trail* of what has occurred. Creating a negative fee adjustment (credit) allows you to maintain a full transaction history.

The Fee record

| Field | Description |
| --- | --- |
| Apply To | Select the participant to whom this adjustment will be applied. |
| Date | Enter the date of the adjustment |
| Description | Enter sufficient description to explain the transaction. |
| Amount | Enter the transaction amount. A positive amount will increase fees owing while a negative amount will decrease (credit) the amount owing. |
| Include as Membership Fee | Check if the fee adjustment is to be considered an adjustment to membership fees. Otherwise, it will be considered an adjustment to course fees. |

### Review Online Payment Status

Use this procedure to review the status of all *Eway request for payment* attempts. By default, the procedure displays all payment attempts for the last 14 days. The date range may be changed using the From and To date editors positioned on the toolbar.

Note the status code **06 Error** is a general catch-all error when further detail is not forthcoming from the issuing bank / card provider.

If a payment request remains unprocessed, you may re-request the status result by...

1. Select the required payment request from the grid, and
2. Click the *Re-Submit* button.

The payment request life cycle

A payment request has the following life cycle...

1. The u3admin website creates a unique access code.
2. The u3admin website persists the access code in a payment request record in the U3A's database.
3. The u3admin website activates the EWAY API and passes the access code along with card details and the payment amount in a payment request call.
4. The EWAY website processes the payment and returns to the u3admin website.
5. The u3admin website retrieves incomplete payment requests from the database and interrogates the EWAY API to ascertain the payment result.
6. For those requests that the EWAY API has marked as complete, the u3admin will either...
   1. Create a receipt if the request has been successful. The payment request will be updated as **Processed** and a success result code recorded.
   2. If the request has been unsuccessful, the payment request will be marked as **Processed** and the failure codes recorded. A receipt will not be created.

A request record may therefore have a Status result that is either blank, meaning unprocessed by the u3admin system or **Processed** meaning the above life cycle is complete for that request.

HTTP and/or other network errors will leave the request in an unprocessed or incomplete state. If the request was created in the *Member Portal* then it will be processed the next time the member attempts to enter the Member Payments sub-menu. A similar event will occur when the administrator re-enters the Admin Portal. If neither of these events occur, the request will be re-processed overnight.

Those status records with a result code of 00 represent successful payments. All others represent either a cancelled or declined request.

### Complimentary Membership

Use this procedure at least once per year to assign complimentary membership to selected participants. Typically, complimentary membership means that membership fees are waived. Course fees may also be waived but this depends on options selected in [Add/Edit Courses](#Add_Edit_Courses603B9451). Finally, postal fees may also be included as complimentary. This is defined in [Membership Fees](#Membership_FeesD7AD44D4).

Complimentary membership is applied to a year. The default year is the last year defined in [Add/Edit Enrolment Terms](#Add_Edit_Enrolment_TermsFA85892B). You may select an alternate year if required.

The software provides check boxes for you to identify membership groups to be made complimentary. The check box, *Assign to Life members* is automatically ticked and cannot be unticked. All other check boxes are optional.

You may add complimentary membership to other members not otherwise part of the groups listed via the section titled, *Assign Ad Hoc Complimentary Members.* Note that multiple members may be assigned simply by selecting multiple entries in the *Assign to Members* editor. Use the *Reason* field to explain why.

Finally, you may remove complimentary memberships previously assigned using the section titled, *Remove Complimentary Membership*. Again, multiple participants may be removed at once.

When you are satisfied with your selection, click the **Process** button. After a short period of processing the system will return to the *Home* screen. During processing the software will...

1. Set the *Financial Year* to the year selected.
2. Create a zero-value cash receipt to document the complimentary status of the participant.

### Financial Status Enquiry

Enter topic text here.

### Course Fess Due Enquiry

This procedure allows you to enquire as to the financial status of participants in a course. It is mainly intended to check that course fees have been paid.

On selection of a course, all participants in the course will be displayed including their total fees due. By default, the *Active Participants* tab is displayed meaning enrolled participants not waitlisted. Click on *Waitlisred Participants* or *Withdrawn* *Participants* to view those lists.

On any list, click a participant row to view the detail of fees owing for that participant.

## Add/Edit Participants

Participants are people associated with the U3A. Normally they are students but are also leaders, volunteers, committee members and so on. A participant may have multiple roles within the organisation.

The addition of a participant's membership details is intended to be a self service function via the *Member Portal*. This procedure is therefore provided for administrators to make adjustment only as required. It is also the primary means of communicating to participants via email, post and SMS. To communicate with participants...

1. Filter the participant records. This can be done by

1. selecting a tab from the top of the grid. Thus you may select Current Participants, Leaders only, Clerks, Committee etc,
2. Use the grid's filtering features to refine your selection
3. Select the required participants by clicking the check box on the left hand side of the grid.
4. Click the **Communicate** button.

For further detail on selection and filtering please review the [Grid](#Grid) topic. For detail on communication the [Communicate](#Communicate) topic is available.

A note on filtering

This procedure contains two data filtering facilities...

1. the tab strip above the grid, and
2. the standard filter button on the grid's toolbar

These filters are additive meaning an AND operator is applied. Thus, if the *Leaders* tab is active and a *Financial To* filter of 2024 selected the result will be those members who are leaders AND Financial To 2024.

Importantly, when the toolbar filter is closed, all filters are cleared and the tab strip active tab is reset to *Participants*.

The Participant record

The Personal group

| Field | Description |
| --- | --- |
| Title | Optional. Enter or select the person's title. |
| First Name | The person's first or given name. The person's middle name may also be entered to avoid duplicates. |
| Last Name | The person's last name (surname) |
| Post-Nominal Letters | Optional. [Post-nominal letters](https://en.wikipedia.org/wiki/Post-nominal_letters) are letters placed after the name of a person to indicate that the individual holds a position, office, or honour. |
| Gender | Male, female or other, |
| Birth Date | Optional |
| Occupation / Skill | Optional. Knowing the participant's previous occupation/skills may assist in locating useful volunteers/leaders. |

The In Case of Emergency tab group

| Field | Description |
| --- | --- |
| Contact | Enter the name of the person who is to be contacted in case of emergency. |
| Phone | Enter the phone number of the person to be contacted in case of emergency. |

The Carer's Details tab group

| Field | Description |
| --- | --- |
| Name | Enter the name of the participant's Carer. |
| Company | Enter the company or organisation that employs the carer. |
| Phone | Enter the carer's phone number. Ideally, this is a mobile number to receive SMS messages. |
| Email | Enter the carer's email address. Please take care on entry as only minimal validation is performed. |
| Receives Email Copy | Tick this checkbox if the carer is to receive copies of email and SMS messages. |

The Address / Contact Information group

| Field | Description |
| --- | --- |
| Street | The person's street details |
| City | The suburb/city in which the person lives |
| Postcode | The four digit Australian postcode |
| State | The Australian state |
| Email | This field is normally, read-only. To enable edit, click the edit (pencil) button to the right of the field.  Enter the person's email address. Normally this is the same address they login with.  Note that two or more records may share the same email address. These are said to be *Linked* participants. Linked participants share a common login and are mostly seen as spousal partners or a member assisting another.  **Note**: The recommended method of changing an email address is via *Manage Credentials* in the Member Portal. Changing an email address in *Add/Edit Participants* is provided as a convenience method to assist if the member is not receiving their confirmation email as expected. As such it should be considered as a measure of last resort. |
| Home Phone | The person's home phone number, if any. |
| Mobile | The person's mobile number, if any. |
| Silent Contacts | This field determines the visibility of electronic addresses. Select from the list, Email, Phone, both Email & Phone or accept the default of None.  If phone numbers are silent, they will not be visible the Member Portal and cannot be used by leaders/clerks to contact the members.  If the email address is silent...   * **Leaders**. The email address will not be displayed in the Member Portal or Class Schedule. * **Students.** The email address remains visible to leaders/clerks to allow communication with class participants. |
| Mail Preference | Select the preferred communication method being *Email* or *Post.* |
| SMS Opt-Out? | Tick if the member requests **not** to receive any SMS messages. |

The Membership group

| Field | Description |
| --- | --- |
| Financial To | The year to which a participant is financial to. This field is automatically maintained by the system and updated in response to the receipt of member fees. Note that leaders and life members are automatically made financial to the current year.  The *Financial To* year is the primary determinant of a participant's membership status. Records with a financial to year prior to the current year are considered inactive. They are not displayed or reported unless specifically selected. To select members not financial, select the *Unfinancial* tab in this procedure. To select all records, financial and not financial, click the All Records *tab.* |
| Date Joined | This field is automatically maintained by the system and is the date the participant record was initially created. It may be edited if required. |
| Date Ceased | The date the participant ceased, if any. Ceased members are never reported unless specifically selected via the *Date Ceased* tab in this procedure. |
| Reason | This field is enabled when a valid *Date Ceased* is entered. Select the reason the person ceased membership from the available list. |
| Life Member? | Tick if the participant is a Life Member. |

## Add/Edit Contacts

A **contact** can be any person associated with your U3A but is not a participant. Think of the list of contacts as your U3A's virtual Teledex.

A contact may be assigned one or more **Tags**. A tag is simply a means of grouping like contacts together.

Use this procedure to maintain your list of contacts and tags. The procedure consists of three tabs...

**Contacts Tab**

Use this tab to add, edit or delete contacts. The fields on the contact record mimic the *participant* fields discussed in the [Add/Edit Participants](#Add_Edit_Participants5E221E07) topic. The major difference being a contact record only requires a First and Last Name. All other fields are optional.

The *Email Address* field requires special note. Unlike the Participant email address, no validation of the contact email address is performed. It is therefore important that the email address be carefully checked before saving the record.

**Contacts By Tag Tab**

This tab provides a list of contacts grouped by tag. Note that a contact may be listed multiple times if it has been assigned multiple tags.

**Add/Edit Tags Tab**

This tab allows the addition of new Tags and the edit or deletion of existing tags. A tag has two properties...

* 1. *Can Lead?* Contacts assigned the tag with this field checked will be permitted to lead classes.
  2. *Can Enrol?* Contacts assigned the tag with this field checked will be permitted to enrol classes.

Refer to [The difference between a Participant and a Contact](#The_difference_between_a_Parti198A4145) topic for a discussion of system behaviour when these fields are checked.

Both the Contacts tab and the Contacts By Tag tab have the ability to communicate with contacts. Review [Communicate](#Communicate) topic for details.

## Add/Edit Committee

This procedure allows you to assign a Committee position to a participant.

To add a Committee member, click the grid's add button, then select the position from the drop-down list and the participant.

Committee positions are defined in [Organisation Details](#Organistaion_DetailsFE7141D5). Importantly. if a committee position name changes from say, *Course Coordinator* to *Course Liaison,* the incumbent's role will not be automatically updated. You will have to edit the record and select *Course Liaison* from the drop-down selection.

You cannot assign a Committee position to a person who is not a participant.

## Add/Edit Volunteers

This procedure allows you to assign a participant to a volunteer group.

Volunteer group activities are defined in [Organisation Details](#Organistaion_DetailsFE7141D5). Importantly. if an activity name changes from say, *Maintenance* to *Gardens & Maintenance,* all group members will require reassignment. Try, therefore to get your group names correct and avoid change once the group members have been assigned.

To add members to a volunteer group...

1. Select the group activity from the drop-down selection list above the grid.
2. Click he grid's add button
3. Select the participant to add. You may also add a comment prior to saving the record.

You cannot assign a volunteer activity to a person who is not a participant.

## Enrol Participants

Normally, course enrolment is a self-service activity performed by participants via the *Member Portal*. The procedure **Enrol Participants** is therefore intended to allow administrators to make manual adjustment as required.

An enrolment exits for a course within a term. Thus a person may be enrolled in say, Tai Chi in Term 1 but not in Term 2.

When an enrolment is made via the *Member Portal* it is initially a request only. Depending on the person's financial status, course's maximum number, and the current number enrolled that request may be accepted or **Waitlisted**. The system will automatically move an enrolment request from waitlisted to accepted as space becomes available. The system will never automatically move a person from accepted to waitlisted.

To view or edit enrolments...

1. Select the Term required. The software will default to the current enrolment term.
2. Select the course required.
3. Optionally, select the class required. Note that this field is only required when the course has different participants in each class.

On entry of these details the current course enrolments will be displayed in the grid, the leader's details and enrolment statistics will be displayed in the columns to the right.

With the grid you are able to...

1. Add or Delete enrolment records.
2. Assign waitlist status
3. Assign course clerks
4. Select multiple records on which to perform a *Quick Action*.

Quick Actions

| Actions | Description |
| --- | --- |
| Quick Enrolment | This action allows you to select multiple participants to enrol in the course. Clicking the button will popup a form in which multiple participant records may be selected. The selected records may be added as waitlisted or not. |
| Set Selection Enrolled | Sets the selected grid's records as enrolled. This option is intended to quickly move wiatlisted requests to enrolled. |
| Set Selection Waitlisted | Sets the selected grid's records as waitlisted. This option is intended to quickly move enrolled requests to waitlisted. |
| Transfer Selection | Allows the transfer of selected participants to another course/class. This may be useful if a full course is to be split in two, for example.  The transfers are made with the current enrolment status intact. |
| Copy Selection | Unlike *Transfer Selection* which moves an enrolment from one course to another, this quick action copies the selection leaving the original enrolments in the current course in place.  It might be used to move enrollees in a Term 1 beginner course to a Term 2 advanced course, for example. |
| Delete Selection | Deletes the selected enrolments. |

## Review Class Dropouts

This procedure is a display of deleted enrolments including the date/time of deletion and the login of the person that performed the deletion.

It is intended to assist in the event of a query being raised regarding the status of an enrolment.

## Class Attendance

Normally, class attendance is a self-service activity performed by leaders, clerks or even participants via the *Member Portal*. The procedure **Class Attendance** is therefore intended to allow administrators to make manual adjustment as required.

To view or edit class attendance...

1. Select the Term required. The software will default to the current enrolment term.
2. Select the course required.
3. Optionally, select the class required. Note that this field is only required when the course has different participants in each class.
4. Select the class date required from the drop-down list, or click the plus (+) button to create an additional class time.

On entry of these details the current attendance status will be displayed in the grid, the leader's details and enrolment statistics will be displayed in the columns to the right.

One of three attendance status may be assigned to a participant...

1. Absent without apology. This is the default status initially assigned.
2. Absent with apology.
3. Present

To assign an attendance status using the grid, edit the required row and select the status from the drop-down list. However, you will find it much quicker to assign the status using *Quick Rollcall*.

Quick Rollcall

To assign an attendance status using Quick Rollcall simply select all enrollees with the same status on the grid. Then, in the *Quick Rollcall* group box, select the status required, optionally enter a comment and click the *Set Selection button.*

Apply Student Leave

Student leave details are created via the *Member Portal*. Normally, such leave is applied to attendance once only when all attendance is assigned the default of *Absent without apology*. Click this button to apply leave created after this event.

Reset Selected

Click this button to reset selected attendance records. This procedure will delete the attendance record and then re-create it with a status of **Absent without apology**.

It is especially useful in deleting duplicated records. In this instance, Filter the attendance records so that only those with a status of **Absent without apology** are displayed. Select and then click the **Reset Selection** button. This will delete all the selected records but only re-create those not duplicated.

Ad Hoc Attendance

You may use this option to mark the attendance of any other participant attending the class but not formally enrolled.

## Lucky Member Draw

Lucky Member Draw allows you to create a list of entrants from which one or more are randomly selected as winners. The procedure consists of three modules...

**Module 1: Draw Controller**

The controller allows you to create a new draw, name the draw and manually enter entrants into the draw. In addition, the following buttons are available...

1. **Reset Draw**. This will clear all current entrants from the draw.
2. **Scan QR Code**. See below.

Note that only one draw may be active at any time. The number of entrants is limited only by the size of your membership.

**Module 2: Scan QR Code**

When the *Scan QR Code* button is clicked from the Controller module, a QR code will be displayed on the screen. Members with a mobile device will be able to enter the draw by scanning the code. The intention is that the QR code will be displayed at an event to be held by your U3A. Members arriving at the event will be able to scan the code and automatically be entered into the draw.

After scanning the code, the member will be required to login. The system will record the entrant and then automatically logout after 10 seconds.

Only member logins that access the *Member Portal* are allowed entry into the draw. Administrative logins will be rejected. A member may only enter once into any one draw.

The QR code is designed to be printed. To print, press CTRL-P or select *Print* from your browser menu when the QR code is displayed. It is permissible to print multiple pages and scan simultaneously.

**Module 3: Draw Display**

This module performs the random prize selection. It is designed to be projected to a large screen device such as a television or overhead projection system. The following buttons are available...

1. **Pick a Winner**. Click to randomly select and display a prize winner on screen. You may pick as many winners as there are prizes by repeating this process. Once a prize is won the winner will be removed from the pool of entrants meaning they will not be able to win another prize.
2. **New Draw**. Each winner is numbered sequentially as First Prize, Prize #2, Prize #3 etc. Click this button to reset the number back to 1a All winners will be returned to the pool of available entrants.
3. **Refresh Data**. Refreshes the list of entrants from which to pick a winner. This button should not be clicked while a draw is in progress. You may wish to refresh before a *New Draw.*
4. **Finalise & Close**. This button will finalise the draw and return you to the administration home page.

A Member Draw Workflow

The *Lucky Member Draw* has been designed to operate on multiple devices at the same time. Here is a suggested workflow...

1. Prior to the event, enter the *Controller* module and setup the name of the draw.
2. From the *Controller* click the *Scan QR Code* button. Print one or more QR Code pages to be displayed at the event so that members may enter the draw automatically.
3. At the event...
   1. Place the printed QR Codes in prominent locations so that members may automatically enter the draw. Alternatively, the QR code can be displayed on a digital device from which members can scan.
   2. Use a workstation to enter the *Controller* module. Select members for entry into the draw as necessary. This can be done as an alternative or in addition to scanning the QR code.
   3. Optionally, connect the same or another workstation to a large screen device.
   4. Enter *Draw Display* and when ready click **Pick a Winner** to randomly select prize winners.
   5. When all is complete, click the **Finalise & Close** button to close the draw.
4. Destroy any printed QR Codes. They cannot be used to enter another draw but, if kept may lead to confusion.

## Bring Forward Enrolments

Enter topic text here.

## Auto Enrol Participants

Enter topic text here.

## Correspondence Hub

The *Correspondence Hub* provides detail of email queued for background processing overnight. It also provide access the Postmark server's record of email processed over the last 30 days,

The procedure consists of four tabs...

[Queued Transactional Email](#Queued_Transactional_Email2228B24E)

Email automatically generated as the result of transactions occurring in the system. These include cash receipts, enrolment notices and leader reports.

[Queued Broadcast Email](#Queued_Broadcast_EmailB00892CE)

Broadcast email are announcement and informational emails sent to participants via the U3Admin.org.au website. If you include merge codes or attachments that email is queued and sent overnight. This tab provides detail as to the status of queued broadcast email.

[Queue Leader Reports](#Queue_Leader_Reports2FC394C7)

Allows the selection of Leader Reports to be emailed to class officials overnight.

[Statistics / Bounces](#StatisticsBonuces)

This tab provides access to Postmark's outbound email statistics for the last 30 days. In particular, it provides detail on soft and hard email bounces.

[Search](#Search)

Search for email sent to a selected participant.

[Suppressions](#Suppressions)

Provides access to your email provider's suppressed email list.

### Queued Transactional Email

Reports such as Cash Receipt, Enrolment Notice and Leader Reports are automatically generated by the system in response to activity by members and/or administrators. These reports are emailed to participants overnight.

The **Queued Transactional Email** tab allows you to view the result of those emails for the last 30 days. It also allows you to send or re-send selected email to participants. This could be helpful for example, if the email requires urgent sending or if the previous automatic email has failed to send.

The *status* of an email will be...

* Read to send
* Accepted
* Not Accepted

*Accepted* means that the email has been accepted for delivery by the Postmark email service. It does not mean the email has been delivered to the recipient. To view the status of an email after acceptance by the Postmark system you must login and use the [Postmark](#StatisticsBonuces) tab and/or the [Postmark website](https://www.postmarkapp.com).

Preview Email

To preview email to be sent, select the required items from the grid and click the *Preview* button. The preview will be displayed in an on-screen PDF viewer.

Send Email

To send email, select the required items from the grid and click the *Send Mail* button. The email will be sent without further ado.

Delete Email

To send email, select the required items from the grid and click the *Delete* button. Note that email is automatically deleted after 30 days. This option is therefore provided to correct mistakes and prevent incorrect email from being sent to participants.

***Hint****: Be a good digital citizen*

*Sending email places a heavy load on system resources. Do not send email during working hours unless it is urgent.*

### Queued Broadcast Email

Broadcast email are announcement and informational emails sent to participants via the U3Admin.org.au website. If you include merge codes or attachments that email is queued and sent overnight. This tab provides detail as to the status of queued broadcast email.

Depending on attachment size, broadcast email can be quite large. For this reason broadcast email is only kept for seven days.

This tab is for informational purposes only. If the email is to be re-sent, it must be recreated.

### Queue Leader Reports

This option allows you to select and queue Leader Reports to be emailed overnight.

1. Select or accept the *Enrolment Term* and click *Process*. The system will fill the grid with all classes in the selected term.
2. Select the classes that you wish to print reports for.
3. Select the reports from the list required.
4. Click the button titled, *Queue report(s) for email*.

The selected reports for the selected classes will be created and queued. They may be reviewed in [Queued Transactional Email](#Queued_Transactional_Email2228B24E).

### Statistics/Bounces

This tab provides statistics obtained from the Postmark email server. The details provided are...

| Property | Meaning |
| --- | --- |
| Sent | The total number of email sent in the current period. |
| Opens | The total number of times email has been opened by the recipients. If a recipient opens the same email three times then this value is increased by 3. |
| Unique Opens | The total number of times email has been uniquely opened by recipients. If a recipient opens the same email three times then this value is increased by 1. |
| Spam Complaints | The number of spam complaints received. |
| Spam Complaint Rate | Total spam complaints as a percent of total email sent. |
| Bounced | The number of bounced emails sent |
| Bounced Rate | Total bounced email as a percent of total email sent. |

The *Bounce* cell values are buttons that when clicked will provide further detail on the emails bounced in a secondary grid. This grid, in turn contains a Bounce Type cell which when clicked will provide full detail of the bounce including the recipient's details if available.

**Engagement**

Total *Sent* compared with *Unique Opens* can be used as a measure of engagement. The closer these figures equal each other, the more engaged your audience is. *Opens* compared with *Unique Opens* can however be a two-edged sword. More Opens than Unique Opens may indicate an interested and engaged audience or, it may indicate a complex email that may have to be read a number of times for readers to comprehend its content.

**Bounces & Spam Complaints**

There are many reasons why an email will bounce. Most will be either a Soft bounce meaning the issue is temporary and will probably resolve itself, or a *Hard Bounce* meaning Postmark will block further email to that address.

A notable exception to this rule is the *Relay Access Denied* error. This is most often caused when the domain part of a recipient's email address is incorrect. Postmark will report this as a *Soft* rather than a *Hard*bounce. To maintain good reputation this error must be acted on immediately.

Of all bounce notices spam complaints are the most problematic. Postmark's tolerance for spam complaints is 0.1% of email sent. You can expect Postmark to permanently deactivate email addresses reporting complaint if this tolerance level is exceeded. Multiple transgressions will result in email flow being paused until the situation is resolved.

A full list of bounce type provided by Postmark is provided below.

| Name & Description |
| --- |
| **Soft bounce/Undeliverable** — Unable to temporarily deliver message (i.e. mailbox full, account disabled, exceeds quota, out of disk space). |
| **Hard bounce** — The server was unable to deliver your message (ex: unknown user, mailbox not found). |
| **Message delayed/Undeliverable** — The server could not temporarily deliver your message (ex: Message is delayed due to network troubles). |
| **Unsubscribe request** — Unsubscribe or Remove request. |
| **Subscribe request** — Subscribe request from someone wanting to get added to the mailing list. |
| **Auto responder** — "Autoresponder" is an automatic email responder including nondescript NDRs and some "out of office" replies. |
| **Address change** — The recipient has requested an address change. |
| **DNS error** — A temporary DNS error. |
| **Spam notification** — The message was delivered, but was either blocked by the user, or classified as spam, bulk mail, or had rejected content. |
| **Open relay test** — The NDR is actually a test email message to see if the mail server is an open relay. |
| **Unknown** — Unable to classify the NDR. |
| **Virus notification** — The bounce is actually a virus notification warning about a virus/code infected message. |
| **Spam challenge verification** — The bounce is a challenge asking for verification you actually sent the email. Typcial challenges are made by Spam Arrest, or MailFrontier Matador. |
| **Invalid email address** — The address is not a valid email address. |
| **Spam complaint** — The subscriber explicitly marked this message as spam. |
| **Manually deactivated** — The email was manually deactivated. |
| **Registration not confirmed** — The subscriber has not clicked on the confirmation link upon registration or import. |
| **ISP block** — Blocked from this ISP due to content or blacklisting. |
| **SMTP API error** — An error occurred while accepting an email through the SMTP API. |
| **Processing failed** — Unable to deliver inbound message to destination inbound hook. |
| **DMARC Policy** — Email rejected due DMARC Policy. |
| **Template rendering failed** — An error occurred while attempting to render your template. |

### Search

Use this procedure to search all email for a selected participant over the last 30 days.

The found email will be displayed in a grid. Click the *Details* button on a desired row to view additional detail including Delivered, Opened and Link Click event details.

***Note:*** *It is possible the participant is using security software that prevents event details from being recorded. In this case, the event details grid will not contain any data.*

### Suppressions

To ensure reliable delivery of email to all recipients, it is essential that you maintain **good email reputation**. An important part of maintaining reputation is to avoid sending email to non-existent email addresses and honouring recipient requests to unsubscribe from your bulk (broadcast) email communication.

Email suppressions are email addresses that are blocked. They will not receive further email from you. Suppressions are created as the result of a *Hard Bounce* or a recipient *Unsubscribe* request. Normally, the list requires little maintenance but entries may be deleted if...

1. You have confirmed the email address is valid, or
2. The unsubscribe request was accidental.

You may also delete a suppression if the email address is no longer associated with a U3A participant or the participant is not financial.

Deleting a suppression means that the email address will no longer be automatically blocked.

# Theme & Settings

The Theme & Settings module allows you to customise your workspace to your liking. The preferences chosen affect only your device. They do not affect any other device using the system.

The options available are...

| Setting Option | Description |
| --- | --- |
| Theme | Our software uses a single theme known as fluent. You may choose a mode being, *Fluent Light* or *Fluent Dark*. The mode determines the theme background and alters coloring to suit. |
| Menu Style | Choose from *Sidebar* or *Top Menu* style. The sidebar places the menu on the left hand side of your workspace, while the top menu is placed at the top of the screen.  **Hint**: Choose a menu style that maximises your workspace depending on the aspect ratio of your device. On devices that are wider in width than height (for example: 16x9) a sidebar is probably more appropriate. On square shaped devices, a top menu might be more to your liking. |
| Menu Behaviour | By default, the menu will automatically adjust to your device's screen size. On larger devices it is fully displayed, and hidden on smaller devices to maximise screen size.  If this behavior is not to your liking, choose a behavior from the list provided. |
| Sidebar Image | An random image will be displayed in the bottom right hand corner of your workspace if the sidebar menu style is chosen.  You may choose a fixed image or none at all if you so desire. |
| Font Size | The system comes with three pre-determined font sizes; small, medium and large. By default, the small size is used.  You may choose a font size to your personal preference. Alternatively, hold the CTRL key down and scroll your mouse wheel to change the browser's font size. |
| Accent Color | The fluent them has one primary or accent color. Choose the color to your liking. |

# Portal (Admin)

Enter topic text here.

# Reports Menu

Enter topic text here.

# Troubleshooting

Help when you need it.

* [Email](#Email)
* [Increased Spam Email Activity](#Increased_Spam_Email_Activity7AFB4AD5)
* [Send Outlook email via Postmark](#Send_Outlook_email_via_Postmar7689E6F9)
* [Login & Password](#Login__Password435CDEA0)

## Email

Introduction

Email is the primary means of communication with members. It is therefore central to the successful operation of the system and could be considered its Achilles Heel if there are issues. Email to members is spilt into three categories…

1. **Broadcast Email**. This is email generated by administrative system users and typically used for announcement purposes. Broadcast email always has an Unsubscribe link at the bottom and is by far the largest category of email.
2. **Transactional Email**. Email generated by the system normally to acknowledge the completion of a transaction or system function. For example, cash receipt, enrolment acknowledgement, leader reports and status reports to the membership officer.
3. **High Priority Transactional Email**. Email considered critical to the operation of the system. These are the initial login confirmation and password reset emails sent to members. These emails are processed on a completely different server to the other categories.

Postmark

The u3admin.org.au system uses [Postmark](https://postmarkapp.com/) as it's email service provider. At least one member of the U3A group will be given access to this software to review sent email. Normally, that person has the Security Admin role.

Reputation

To send bulk email reliably, your U3A group must attain good email reputation and keep it. The first step in ensuring good reputation is to register a unique internet Domain Name. This is the part after the @ symbol in an email address, for example, myU3A.org.au. This process is always complete well before you start using the u3admin website.

Your domain name is provided to Postmark and additional checks performed. You cannot send any email via Postmark until this process is complete.

Once you have reputation, you must keep it. Here are a few tips...

1. Use it or lose it. Reputation comes from the Internet learning about the email sent from your domain. It cannot learn if there is no email. When you start with Postmark send one or two carefully crafted informational emails to all your members. There will probably be some bounces (see below), so investigate and correct if possible. Eventually you should see 99-100% of email being delivered.
2. Be careful when writing your email. Try to restrict your email to announcements and news. Do not use it as a selling tool.
3. Avoid use of images, especially those you have not created yourself. Images are a primary vector for virus transmission.
4. Test all links you have created. Incorrect and malformed links are a red flag to spam checkers.

**Hint:** Send email off the hour and preferably in the evening. Bulk email is mostly a timed activity and usually occurs on the hour. This causes heavy server usage by ISP's which may result in email not being received. Sending it at say, 20 minutes past the hour and in the evening reduces the possibility of server usage issues.

Bounce / ISP Block

If email is blocked from a recipient's inbox it is categorised as a hard bounce, soft bounce or ISP Block..

1. **Hard Bounce**. The ISP was unable to deliver the email. Most often this is because the email address is unknown.
2. **Soft Bounce**. Email has been rejected due to a temporary issue. Some reasons might be...
   1. The recipient's inbox is full.
   2. The recipient uses a paid email service and monies are outstanding.
   3. There is currently hardware/software issues at the ISP.
3. **ISP Block**
4. The sender (ypu) has been blocked by the recipient (member).
5. The sender has poor reputation (Hopefully not).
6. The email contains content considered spam with a high degree of confidence.
7. The email contains content considered viral with a high degree of confidence.

How Postmark processes bounces

* Postmark will be informed of any email bounced or blocked by the recipient's ISP.
* Postmark will record soft bounces but will allow future email to the email address.
* Postmark will block any email address with a hard bounce. A hard bounce may however be reactivated by you.
* Postmark will record ISP Blocks but will allow future email to the email address.

**Note:** Reactivating a bounced recipient should be done with caution. Continually sending email to invalid email addresses will hurt your reputation.

How to investigate an email issue

First, the simple steps...

1. Double check the email address to ensure it has not been mistyped.
2. Ask the intended recipient to check their junk folder.
3. Microsoft now separates email into *Focused* and *Other.* if using Microsoft Outlook, ask the recipient to check email in the *Other* tab on their inbox. *.*
4. Ask the recipient to add your domain to their safe sender's list.

Next, wait a day or two. Sometimes, your reputation recovers or the ISP itself will investigate issues and release the email.

If this fails, open the [Postmark](https://postmarkapp.com/) website and login.

1. Select your server from the list provided.
2. Select the email stream the email was sent on.
3. Below the graphic of sent email you will find a count of bounces and ISP blocks. These are links.
4. Click on the links to obtain a list of the blocked/bounced email.

Each email in the list will contain a reason for the block/bounce. Investigate and correct if possible.

Note that Postmark or u3admin.org.au website administrators cannot correct an ISP Block. The normal approach is to ask the intended recipient to contact their ISP and ask that mail flow be allowed for the domain.

## Increased Spam Email Activity

Unfortunately, increased spam email activity is often associated with sending email in bulk. If email is sent to hundreds of members, chances are that one or more of those members are using a compromised device. They have transmitted your email address to one or more likely many bad actors.

**Rules:**

1. Never open junk email

2. Never click on a link contained in junk email

3. Never download junk email images or click on them

4. Never forward junk email to friends or technicians

Breaking these rules simply informs the bad actor the email address is real.

Spam email arrives in your Inbox

Best to delete it as that will save you from occidentally opening it in future.

Spam email arrives in your Junk Mail folder

Most spam and other malicious email is caught by your email server such as Office 365. Spam will appear in your Junk Email folder when these systems determine an email is suspected junk but without a high degree of certainty.

Its your choice. You can simply leave it there and your software will eventually delete it. Or, you can delete it yourself.

Can anything else be done

Yes, if the U3A group is using Office 365, the spam tolerance levels can be adjusted. This is an advanced topic and should only be performed if the volume of spam has become intolerable. The issue with making such adjustments is that you increase the likelihood of false-positives. That is, email identified by the server as spam but in fact is not.

You can report spam the the Australian Consumer & Competition Commission's Scamwatch program [here](https://www.scamwatch.gov.au/report-a-scam).

You can report spam to the Australian Media & Communications Authority [here](https://www.acma.gov.au/spam-complaint-form)

You can report spam directly to Microsoft by dragging and dropping the offending email into a new email to [abuse@microsoftonline.com](mailto:abuse@microsoftonline.com).

Finally, learn about best practise using the Internet and email. The [Australian Cyber Security Centre](https://www.cyber.gov.au/learn-basics/explore-basics/recognise-and-report-scams) is a good place to start.

## Send Outlook email via Postmark

This is an advanced topic.

Normally you should not provide the ability to send email from a client such as Outlook via [Postmark](https://postmarkapp.com/).

The exception might be a course leader with a large class who does not have access to the Administrative Portal. Sending bulk email to their class via Outlook will be problematic so having access to the Postmark service could be the answer.

Follow the instruction [here](https://postmarkapp.com/support/article/1040-how-to-send-from-outlook-using-smtp#:~:text=How%20to%20Send%20from%20Outlook%20Using%20SMTP%201,the%20account%20you%20configured%20to%20use%20Postmark.%20) to setup an Outlook account using Postmark's SMTP server.

## Login & Password

Introduction

Registration & Login is the first interaction a new or returning member has with the u3admin.org.au website. For the vast majority this is a positive if somewhat tedious experience.

For a small number there will be problems. The process of registering and then acknowledging an email can be daunting for some and assistance will be required.

For others there will be issues with email and some may have complications with password recognition and validation.

Confirmation email not received

The most common issue when troubleshooting login is that a registration / password reset email is not received. Usually, the cause of this issue is the email address provided was incorrect. The first course of action is therefore to ask the member or prospective member to retry the procedure.

If the email is still not received follow the troubleshooting steps in [troubleshooting Email](#Email).

if all else fails, use [Login Security & Role Assignment](#Login_Security__Role_Assignmen00B206AC) to manually confirm the email...

1. Find the login in question from the grid.
2. If the login exists, click the grid's *Edit* button.
3. In the pop-up form tick the *Is email confirmed?* check box and save the record.

Password is invalid

Again, the most common issue is that the password has been entered incorrectly. Otherwise, follow these steps...

1. If the person is already a member ask them to try the *Member Identity* as the password. To find the *Member Identity,* go to the [Add/Edit Participants](#Add_Edit_Participants5E221E07) procedure on the *Participation* menu column. The *Member Identity* is displayed on the grid.
2. Otherwise, ask the member or prospective member to reset their password using the link at the bottom of the login form.
3. Otherwise, follow the "break glass" instructions below.

The "Break Glass" emergency procedure

Use [Login Security & Role Assignment](#Login_Security__Role_Assignmen00B206AC) procedure from the *Admin* menu column. You have the following options...

**Existing members**

1. Find the login in question from the grid.
   1. If it exists, select it by ticking the check box,
   2. click the *Reset Password* button. This will reset the password the the member's *Member Identity*.

or,

1. Find the login in question from the grid,
   1. If it exists, click the grid's *Edit* button.
   2. In the pop-up form change and confirm the password. In this case, the new password must conform to the password strength requirements imposed by the system.

or,

1. If the all else fails, delete the login if it exists and ask the member to re-register. You should rarely have to do this.

***Note****:* If the login does not exist in the grid, it means the login record has never been created or has been deleted. Ask the member or prospective member to re-register.

**New members**

A new member will not have a Participant record. Therefore you cannot reset the password to the *Member Identity.*

1. Find the login in question from the grid,
   1. If it exists, click the grid's *Edit* button.
   2. In the pop-up form change and confirm the password. In this case, the password must conform to the password strength requirements imposed by the system.

or,

1. Delete the login if it exists and ask the member to re-register.

***Note****:* If the login does not exist in the grid, it means the login record has never been created or has been deleted. Ask the member or prospective member to re-register.

Keyword index

**No index entries found.**