UMAS Membership System Guide for Course Leaders

UMAS is the online membership and course management system SH U3A has used since 2022.

Along with the Management Committee, as a course leader you have administrative access to UMAS beyond normal member access. This helps you perform key administrative actions to successfully lead a course.

Any queries? You can email the Course Coordinator at courses@sohiu3a.org.au.

This guide shows you how to:

1. Go to our website

2. Login to UMAS

3. Access the Main Menu
   A. Checking Details of Courses
   B. Reports: Class List and Attendance List
   C. Send Emails

Any queries?
You can email the Course Coordinator at courses@sohiu3a.org.au.

Notes:
- Throughout this document, the example screens are from the *test version* of UMAS that contains simulated data. The title 'TEST U3A Southern Highlands' and the menu items to the left of a screen appear in red.
- By contrast with the Test version of UMAS used in early 2022 training, the live UMAS version does not show the word 'TEST' and the colours are blue (or white on a blue background).
- In the following examples, you are fictitious Course Leader Rick Eng and you are leading two simulated courses: News in Review and Cinema on Monday.
- Some screen shots were taken from 2021 term 4 and some from 2022 term 1.
- UMAS sometimes refers to course leaders as *tutors*.

1.	**GO TO OUR WEBSITE at https://sohiu3a.org.au/**

Pass the cursor over LOGIN at the top right of the screen, then click Course Leader Login.
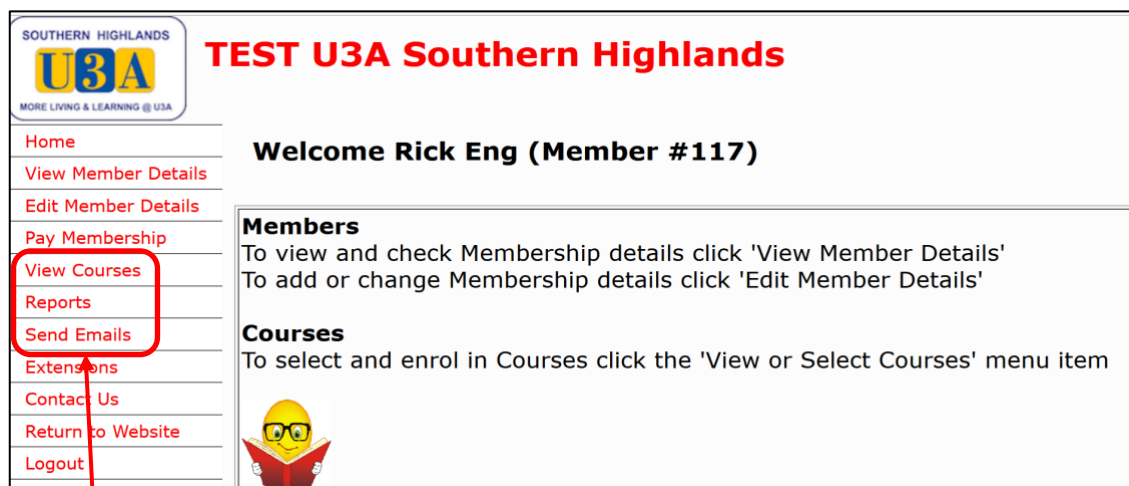
2.	**LOGIN TO UMAS (Membership Administration System)**
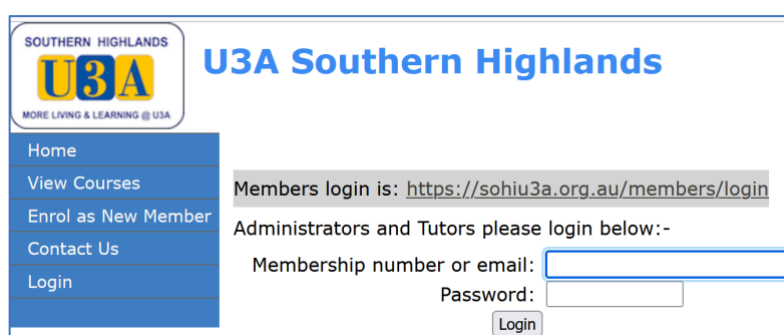
Enter your member number (or email) and password and click Login.

3.	**ACCESS THE MAIN MENU**

The main menu page will appear, including a welcome message.
In the current version of UMAS, the main colour on the left navigation bar is blue.

Key items for course leaders are (A) Checking Details of Courses, (B) Reports, (C) Send Emails.
Clicking on a menu item provides access to a set of functions you can perform in UMAS.
As a course leader, you have access to only those functions needed for your role. For example, you can only view the details of your course; you can email only your participants.

A. CHECKING DETAILS OF COURSES PRIOR TO A NEW TERM

Before the start of a term, the Course Coordinators ask you to check the course details they have entered into UMAS. Please advise them ASAP of any serious errors. They know you will understand that changes in details of venues, dates and times are not easily made at this stage, as they have a cascading domino effect. Usually, you will be sent a draft Course Booklet.
If not, below is an alternative, and more complex, method of finding the information for checking.

Via the SH U3A website https://sohiu3a.org.au/, login to UMAS as a Course Leader.
On the blue left sidebar, click on *Reports*, then the yellow *Courses* tab.
Using the Dates to locate your course
In the second option which begins "List all courses that commence …":
   * For the first two white Date boxes, use the dropdown calendar to enter the term start and end dates, respectively, ignoring the last *Day* box.
   * Ignore the next two lines and their boxes.
   * Click on the green *Courses Occurrence* button to obtain a courses list *in order of starting date*.
   * Locate your course/s –in starting date order – and click on the hyperlinked *Code* (column 3) to reveal your (non-editable) course details – discuss changes with the Course Coordinator.

Example of details produced for the course Cinema on Monday for T1, 2022:

Click on 'Close' to return to the courses list.

B. REPORTS (Enrolment List, Attendance List):
Available after the Enrolment Requests period has closed and members have been advised of their actual enrolments.

Enrolments List (Class List)

What CLs do NOT do with these lists
Please note UMAS does not allow CLs to add members to a course.

The Enrolments Coordinator does this work, as well as adding members who have been waitlisted.

Quick Method: In View Courses, choose your course and click on Rep on the extreme right.

Longer Method: Click on Reports and then click the yellow tab labelled Enrolments.
Choose the required course by clicking on the box labelled 'Choose a Course'.

Then click the green List Enrolments. The following screen appears for the example of Rick Eng:

To obtain a copy of this list, you can:
- click Print (near the top) to print the list. When finished, click Close and return to Reports
- copy the list and paste it into a new Word file, perhaps deleting unwanted columns (those on the right of Email) and removing the colour.

Attendance List

For your Attendance List, go back to the Enrolments tab (in Reports) and the Attendance section near the bottom of the page:

- Choose the required course by clicking on the box labelled Choose a Course.
- Select the start and end dates of the course by clicking in each date box and selecting from the pop-up calendar.
- Tick Match up columns with dates so the list will include a column for each class session and can be used as a sign-in attendance sheet. (The box is usually already ticked.)
- Click the green Attendance List.
- Click the Print button to print the list. Alternatively, you can copy the details and paste them into an Excel spreadsheet or Word file if you wish to save the list and/or reformat it.

Below is the pop-up window, showing the two sessions for the course:

C. SEND EMAILS

It is very important to email class members more than seven days before the course begins. Welcome them to the course and provide any further necessary details, **including the course dates**. If in doubt, you can find these dates from the course description or Attendance List.

The facility described below will automatically send an email to your course participants. The system automatically uses the course enrolment list to fill in each person's email address.

Click on Send Emails in the blue navigation bar and then on the top Enrolments tab.

- By default y*our email address* shows in the Sender field so that replies come to you. It also gives participants your email address if they wish to make contact, e.g., notify you of an absence.
- Type the subject of your email in the 'Subject text' box.
- Choose the required course by clicking in the box 'Select Course'.
- If you have more than one course in the term, send emails to one course at a time.

- You can personalise the message to show each person's first name by inserting as the first line of the text a greeting (e.g., Dear or Hi) followed by a space and [first_name] or [preferred_name]. *You need to be exact*: Dear [first_name]. See the example email that follows.
- Type your message in the white box, re-sizing it if you wish by dragging down the bottom right corner where you see a small black triangle.
- In your message, tell the participants they can reply to the email.
- A hyperlink to a web site may be added in the body of the text.
- Using 'Restore previous email' enables the retrieval of previous emails you have sent to serve as templates for any further messages. Just click on the one you wish to use.
- *One* attachment to your email is allowed. Click on Browse, then on your computer locate and choose the file required.
- At the end of your message, remember to sign with something like 'Regards, Rick'.
- Finally, click on the green Send Enrolment Emails.
- When you now see *something like* this message, click either Yes box – your choice. (Note that in the example below, the emails were sent by the Course Coordinator whose email address is courses@sohiu3a.org.au – that's why we've written "something like this message".)

U3A Southern Highlands

Preparing to email members...

Emails will be sent from U3A Southern Highlands Inc. members@sohiu3a.org.au
Reply-to email is: courses@sohiu3a.org.au
Sending will be done using SMTP
1 member records found to process

Preparing 1 emails, plus any CCs...

All emails prepared.

Your sending rate is limited to 12000 emails per hour.

Confirm sending emails?

Note: If you click Yes below, you **must** wait until the progress bar shows that all emails have sent. If you close the tab/window/browser before all emails have sent, the emails will be queued and sent at a later date.

| **No**, cancel | **Yes**, send **1 emails** and display progress in a **separate tab** | **Yes**, send **1 emails** and display progress in **this tab** |

- This produces a Bulk Emails Progress screen which fairly quickly shows the emails sent.

Example:

On the next page is a typical example from the test website for CL Rick Eng (with 2021 dates).

You will notice:

- the course leader's own address appears in the first field (sender's email address)
- the course leader has typed in a subject
- the course leader has used a personalised greeting, taking care to get it exactly right!
- there is a text editor – similar to that used in Word – which allows you to modify the format of your message (using the dropdown menus under the headings File, Edit, View, etc), to include dot or numbered points, to add an image, to construct a table, and to insert a hyperlink (as Rick Eng has done).

Members | Subscriptions | **Enrolments** | Outstanding Receipts | Emails sent

Email Members with Enrolments

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

Reply-To Email (optional):

rick.eng@gmail.com

CC (optional):

CC email address. Use semi-colon to separate email addresses.

Separate CC email addresses using semi-colons.

Subject:

Cinema on Monday

Restore previous email:

Please Select ∨

Clear Subject and Body:

Clear text

Body Text:

File   Edit   View   Insert   Format   Table

↶ ↷ | Paragraph ∨ | **B** *I* | ☰ ☰ ☰ ☰ | ☷ ∨ ☰ ∨ | 🖼 🔗

Dear [first_name],

Welcome to Term 4 *Cinema on Monday*. Our first session starts at 12:00 noon on 11 October 2021. Please be a few minutes early so that we can check in and be seated.

We meet in the lobby of the Bowral Empire Cinema. Please wear your U3A name badge so that we can easily check you in and others can get to know you at coffee after the movie.

Click on the link above for information about Empire Cinema including its address in the main street of Bowral.

If you wish to make contact with me, you may reply directly and I will receive your email.

I look forward to seeing you for an interesting movie and a friendly chat at coffee.

Regards,
Rick.

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If using Firefox browser, to delete an image: Double-click on the image, then press the Delete button on your keyboard.   *Email automatically saved when sent.*   *The Email will be sent from members@sohiu3a.org.au*

Enrolled Members

Select Course:

234ART31: Cinema on Monday ∨