

a) Viewing your Group Record

To view the **Group Record** for your Group, click on the Group name in the Groups List (see 5.1), or elsewhere where Group names are shown. Groups for which you are a Leader or for which you have editing rights are **highlighted blue**.

Each Group Record comprises four sub-pages:

- **Details** see below
- **Schedule** see 5.3
- **Members** see 5.4
- **Ledger** see 5.5

You can select between these on the row beneath the Group Record title. The active sub-page has its name in black.



*Note: The things that you can view and the operations that you can perform may differ from those described below, according to the System Access and Privileges allocated to your Role by your U3A Committee.*

b) Editing the Group Details

The Group **Details** page holds basic information about the Group, including **Faculty** (optional) and **Status** (Active or Inactive).

Some of the details on this page are used to populate fields when Events are created on the **Schedule** page (see 5.3) and will appear in the **Groups List** (see 5.1) and **Calendar** (see 5.9). Hover the cursor over the fields to display details about what to enter in each field (also refer to the descriptions below).

- The **When** field is free text and used only to give general information about when the Group meets, e.g. “2nd Thursday at 2:00pm”, or “Every Wednesday at 10:00” or “Once a month at a local pub”.

The contents of this field are displayed in the **Meets** field of the Groups Lists on the Public Groups webpage (see 9.4) and the Members Portal (see 10.2).

- The **Start time**, **End time** and **Venue** are optional and are used as defaults when **Events** are created.
- The **Contact** field can be used to give a person's name, telephone number or email address for enquirers to make contact, e.g. "Jane on 0123 456 7890". Be aware that this information may be visible to U3A members or the public, depending on how the Public Links are configured (see 9.4)
- **Max members** can be used if there is a limit on the number of members that the Group can accommodate. When the limit is reached, members may still be added via the Group's **Members** page and are shown with a "*waiting since*" date. However, members are not able to join a full Group via the Members Portal.
- Ticking **Allow members to join online** lets members join the Group (or waiting list, if enabled) via the Members Portal.
- Ticking **Enable waiting list** lets members join a waiting list via the Members Portal if the Max members figure has been reached. Even if the box is not ticked and a maximum group number has been reached, members may still be added to the waiting list via the Group's Members page.
- If **Notify Leader** is ticked the Group Leader will be notified by email when a member joins or leaves the Group or the waiting list.
- When populating the **Information** field, be aware that this information may be visible to U3A members or the public, depending on how your U3A's *Public Links* are configured (see 9.4).
- The **Notes** field is for private notes that are not displayed the public.

After editing any of the details press the **Save Record** button.