

### 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 5.2
- **Schedule** see 5.3
- **Members** see below
- **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 Members

The Group **Members** page holds contact information for the members of your Group.

- If a person is not a Current member (i.e. their membership has not been renewed for the current year), their name will show in red (see Sandi Williams below).
- Members without email are denoted by an icon of an envelope with a red diagonal line through it (see Jen Brown below).
- You will not be able to see the address or phone numbers of any member that has chosen to hide their details from Group Leaders (see Bazza Wilson below), although you will still be able to send emails to them.

Group Record for Architecture				
Details		Schedule	Members	Ledger
Group Members				
Select	Name	Address	Telephone	Mobile
<input type="checkbox"/>	Albert Anderson	10 Einstein Close, Demoton, DM26 7ZZ		
<input type="checkbox"/>	Jen Brown	5 Green Lane, Lower Wick, Demoton, DM4 5GL	01 001 428 679	
<input type="checkbox"/>	Susan Bunting	141 High Street, Demoton, DM12 7RB	0123 888 4444	
<input type="checkbox"/>	Sandi Williams	245 Noplace Lane, Demoton, DM18 2BQ	<a href="tel:01233571598">0123 357 1598</a>	<a href="tel:0707063976">07070 63976</a>
<input type="checkbox"/>	Bazza Wilson	hidden	hidden	hidden
<input type="checkbox"/>	Carol Wiltshire	20 Somerset Street, The Old Farmhouse, Demoton, DM10 1AA		

- If your U3A has switched on the global setting to hide the addresses of all members from Group Leaders, the 'Address' column will not be displayed (see below).

Group Record for Architecture				
Details		Schedule		Members
Group Members				
Select	Name	Telephone	Mobile	Status
<input type="checkbox"/>	Albert Anderson			Current
<input checked="" type="checkbox"/>	Jen Brown	01 001 428 679		Current
<input type="checkbox"/>	Susan Bunting	0123 888 4444		Current
<input checked="" type="checkbox"/>	Sandi Williams	<a href="#">0123 357 1598</a>	<a href="#">07070 639768</a>	Current
<input type="checkbox"/>	Bazza Wilson	hidden	hidden	Current
<input checked="" type="checkbox"/>	Carol Wiltshire			Current

### c) Adding and Removing Members

Click the blue links on the right of the page to:

- Remove a member from the Group [A]
- Make a member a Group Leader [B] - you may have more than 1 leader
- Remove a member from the Leader role [C]

Status			
Current	Leader	<a href="#">remove</a>	<a href="#">cancel leader</a>
Current	Leader	<a href="#">remove</a>	<a href="#">cancel leader</a>
Lapsed		<a href="#">remove</a>	<a href="#">make leader</a>
Current		<a href="#">remove</a>	<a href="#">make leader</a>
Current		<a href="#">remove</a>	<a href="#">make leader</a>

Diagram illustrating the actions available for different member statuses:

- A** points to the [remove](#) link for a Current Leader.
- B** points to the [make leader](#) link for a Current member.
- C** points to the [cancel leader](#) link for a Current Leader.

Members can be **added** to the Group from this page in 2 ways:

- Select their name from the **Add member by name** drop-down list below the table, or
- Enter their membership number (if known) in the **Add member by membership number** box. Members may be added in batches by entering their membership numbers separated by commas.

**Add member by name**

**Add member by membership number**

Separate numbers by commas

When adding members by membership number, you will be prompted to confirm that the name(s) of these members are accurate by pressing the **Add selected members** button.

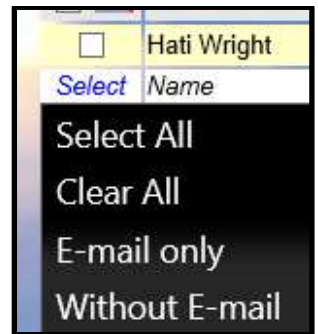
Select	No	Name
<input checked="" type="checkbox"/>	1050	Jen Brown
<input checked="" type="checkbox"/>	1051	Joe Brown
<input checked="" type="checkbox"/>	1053	Ron Brown
Select	No	Name

3 members (3 selected)

#### d) Selecting Members from the Members List

To select one or more members prior to performing one of the operations described below, tick the required box(es) in the left hand column next to each member's name. Or click **Select** at the top or bottom of the column, followed by any of the choices from the drop-down list that appears:

- **Select All** for all displayed members
- **Email only** for members with email addresses
- **Without email** for members without email addresses



#### e) Operations with selected Members

After selecting one or more members as described above, the following operations are available by choosing from the drop-down list below the table and pressing the **Do with selected** button:

- **Send email:** opens a form on which to compose an email (see 6.1)
- **Download Excel:** generates an Excel file containing members' contact details
- **Download PDF:** generates a pdf document containing members' contact details and photo (if available)
- **Remove members:** removes members from the Group

<input checked="" type="checkbox"/>	Hati Wright	2 Green Lane, D
Select	Name	Address
<input type="button" value="Do with selected"/>	<input type="button" value="Send E-mail"/> <input type="button" value="Download Excel"/> <input type="button" value="Download PDF"/> <input type="button" value="Remove Members"/>	

For Excel and pdf downloads you will be asked to tick the fields to include, before pressing the **Download** button:

**Select the fields to be included**  
in addition to a member's name

E-mail  
 Telephone  
 Mobile  
 Address  
 Emergency contact