

Charnwood u3a Web System User Guide for Members

For Cu3a Members

This document is organised to provide guidance to Charnwood u3a members in the use of our web system we are using and which all can access on the Charnwood u3a website (see link below). The guidance particularly covers the members-only area, the starting point of which is the 'home screen'- the page that appears following initial access to the system.

Being web based our system can be accessed from a desktop or laptop computer, or tablet, or a smart phone. Whilst the system is accessible from mobile devices some of the guidance here (e.g. around the use of a mouse, and the way the menus appear) may require modifying to enable successful operation. Web pages may also not display properly in all cases on smaller devices, such as phones and small tablets.

This guide covers:-

- [How to login \(and log out\)](#)
- [Once logged in](#)
- [My profile](#)
- [Help Contacts](#)

Clicking on the section titles will take you to the chosen section.

How To Login (and log Out)

With your membership information (sent to new members and on renewal) you will have been provided with your username. Please ask (see contacts below) if you need a reminder.

To access the Charnwood u3a website type <https://www.charnwoodu3a.org.uk> into your search browser This will take you to the website 'home screen'. For future reference you may find it useful to save this page into your Favourites on your web browser.

On your first visit you need to set a password. This is (slightly peculiarly) done by selecting 'Forgot Password' on the page which generates an email with links to set your password. (This needing to be repeated to set a new password should your password be forgotten!).
Note - the reset password email may take a few minutes to come through. If it does not arrive please check your Junk folder.

Details of how to set your password are given below.

Login

Username

Password

Log In

[Forgot Password](#)

Within the reset email you receive click on the link (“Click here to reset your password”). This will take you to the Password Reset page where you will need to enter your new password twice before clicking “Store New Password”. The page also specifies the sort of characters and numbers which need to be included in your password.

Password Reset

New Password

Confirm Password

Store New Password

Your password must meet the following requirements:

- ✘ At least 1 lowercase letter
- ✘ At least 1 uppercase letter
- ✘ At least 1 number
- ✘ At least 1 symbol
- ✘ Be at least 8 characters long

With your password set (or once known) click Login on the menu bar and then on the page that appears enter your Username and Password and click “Log In”. This will take you into the ‘home screen’ within the system.

If you wish to see that you have entered your password correctly check the box next to “Show Password”.

If you forget your Username, please contact either our Membership Secretary or the contacts given below as they will be able to remind you what it is.

Logging Out

Click on the Logout button in the top of any of the screens within the system, or click Login on the menu then press Log Out. You do not need to return to the Home page to log out.

Note:

1. you will be logged out automatically after 30 minutes of inactivity - a warning chime will alert you to this 2 mins. before you are logged out along with a pop-up message allowing you to continue.
2. it is good practice, for security reasons, to log out before leaving your device unattended for any significant period.

If you have any problems completing this initial log-in please make use of our support contacts. Details of these are at the end of this document.

Once Logged In

Once you log in you will see that some additional menu items appear. Hovering your mouse over some of the menu items will also reveal sub-menu items, which are the individual web pages.

Some of the individual web pages have a number of 'icon links' in the top right hand corner. Hovering your mouse over each icon will bring up a text box that explains their purpose. Clicking the icon will take you to another page relevant to that functionality. Some pages also have hyperlinks (in blue text), that will take you to other pages or to other websites.

The website provides Members with the following features (details of which are described later in this Guide):

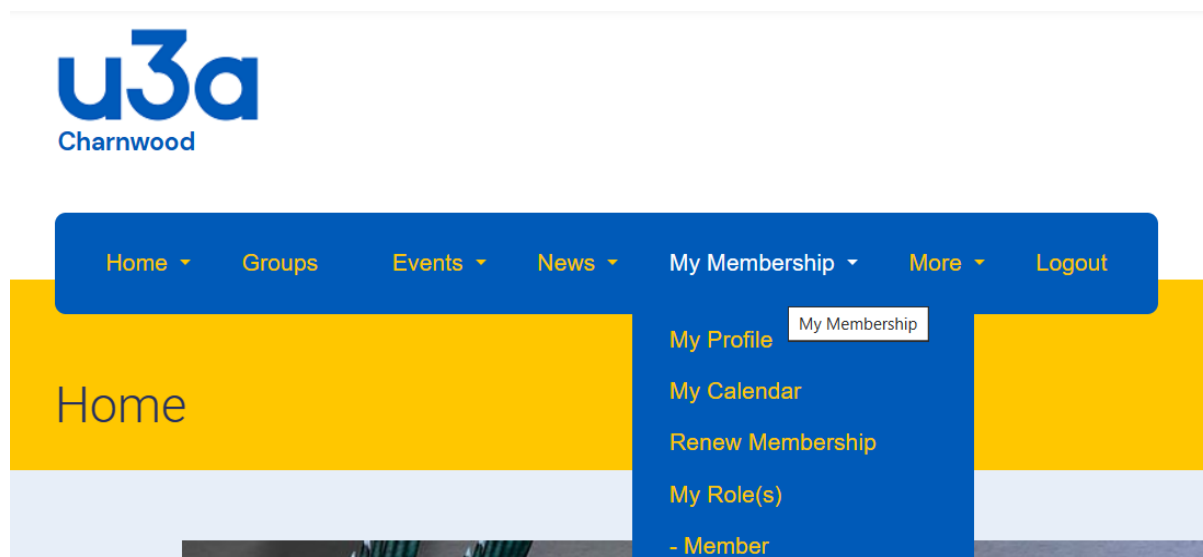
- view & amend your personal details
- view details of the Interest Groups to which you belong
- send an email to the Leader(s) of any Interest Group
- apply to join any Interest Group
- renew your membership
- view details of forthcoming Events
- view details of Events you have signed up for

The design of the website aims to achieve an appropriate balance between the provision of useful features and the need to maintain the security of Members' details.

Not all users will be able to access all parts of the system. Permissions are set to preserve data protection and privacy, and will allow individual users to access areas that are only relevant to them. If you believe that you need access to areas of the system that you are unable to see or edit, please tell our support contacts (their details of these are at the end of this document).

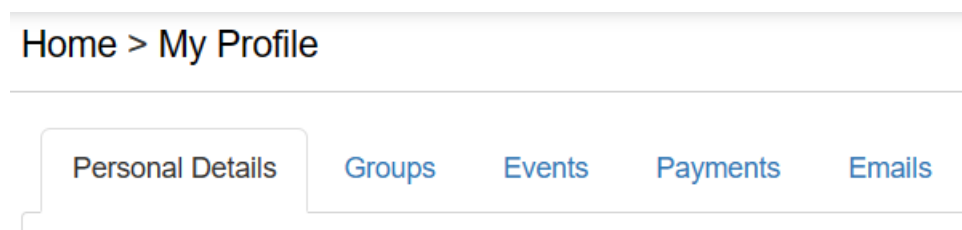
My Profile

Our system holds your details, or Profile (as provided in your application or subsequently modified by yourself). It also links you with the groups you belong to and any Events you have signed up for. These can be accessed, when you are logged in, through the 'My Membership' menu item. Clicking on this displays a drop down showing:



The 'My Profile' link opens a page with these five tabs:

- [Personal Details](#)
- [Groups](#)
- [Events](#)
- [Payments](#)
- [Emails](#)



Clicking on each of these allows you to review, and in some cases edit, the information held about you in the system.

These tabs are explained further in the following sections.

Other web system features relevant to individual members are:

- [My Calendar](#)
- [Renew Membership](#)
- [My Roles](#)

Personal Details

Clicking on this displays the Personal Details tab and includes the information you have provided.

Most of the fields on this page (see example below) can, if required, be amended by you however, some fields will be 'locked' and you will not be able to change these directly. Please ensure that your details are correct, and complete any missing information, as required. If you wish to make changes to any of the fields that have been locked, please contact our Membership Secretary.

Note – you need to press the 'save changes' button (at the top or bottom of the page) for any amendments to be uploaded into the system.

If you make an entry (e.g. phone number) which doesn't satisfy the 'rules' set within the system you will see a red asterisk next to the relevant box, and the system will not allow you to save the change. Please amend the entry in the format requested and try again.

If you wish to, please enter the key details of your occupation(s) prior to retirement. As it is useful within a u3a to know if there are skills and experience that we might be able to draw upon.

When viewing this page please check whether the Gift Aid setting is correct for your current tax status, i.e. that, if set to Yes, you pay sufficient tax for Cu3a to claim Gift Aid on your subscriptions.

Personal	Address Details
<p>Title: (Please Select) ▼</p> <p>First Name(s):</p> <p>Initial(s):</p> <p>Last Name:</p> <p>Email:</p> <p>Home Phone:</p> <p>Mobile Phone:</p> <p>Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female</p> <p>Date Of Birth: <input type="text"/></p> <p>Occupation:</p> <p>Membership Level: Individual</p> <p>Member No:</p> <p>Partner:</p> <p>UserName:</p> <p>News by Email?: Yes</p> <p>Join Date: 2012</p> <p>Renewal Date: 2023</p> <p>Direct Debit Date:</p>	<p>House Name/Number:</p> <p>Road:</p> <p>Address 3:</p> <p>Town:</p> <p>County:</p> <p>Postcode:</p> <p>Emergency Contact Information</p> <p>Name:</p> <p>Relationship:</p> <p>Phone:</p>

Additional

Primary U3A (Associate Membership only):

Notes

Communication

Receive Third Age Trust Magazine: Yes No

Gift Aid

Gift Aid?: Yes

 Save Changes

 Cancel

NOTE: if the 'Partner' field is blank, and you wish to add your partner's name there, the system will allow you to do this, and will tell you it has saved it. The Membership Secretary will then need to create the link between you and your partner within the system. Once this has been done your partner's membership number will appear in the top of the two partner fields, and their name will appear in the field below.

To make any amendments click on the relevant field, make the changes required, and then click on 'Save Changes' in the top/bottom right of the page. If you make a mistake either simply overwrite it with the correct data, or click the 'Cancel' box in the top/bottom right of the page. **Your changes will only be saved once you have clicked 'Save Changes'.**









If you are willing to help with the running of the u3a in any way – big or small – please click 'Yes' against 'Are you willing to volunteer', and add any details of the assistance you are willing to provide into the text box below. There are a number of ways you may be able to help, from sharing your skills and knowledge in an Interest Group (not necessarily as a leader), to helping with the set-up and running of our monthly meetings (setting out chairs, helping with teas etc), to being a part of the committee that runs our u3a. If you are willing to help and would like to discuss the opportunities in more detail, please contact our Membership Secretary.

Once you have saved the changes successfully you will see a green banner message on the screen confirming this.



Groups

Clicking on the Groups tab shows which Interest Groups you are a member of or on the Waiting List for, and whether you are the leader of any of them.

Group	Leader?
10+ mile walking	 
6+ mile Walking	 
Current Affairs	 
Thursday 6 Milers	 

Clicking on the name of any Group will take you to a page that gives key details of that Group.



In the top right hand corner of each Group's page is an icon that will allow you to email the group leader(s). (Leaders have additional icons visible, details of which can be found in the Guidance for Group Leaders).

To exit a Group page use the 'back arrow' in your browser, or right click your mouse in a blank area of the screen and then select "Back" on the menu that appears. This will take you back to the Groups tab in your Profile.

NOTE: Only Group Leaders or System Administrators and the Groups Coordinator can create or modify interest group listings. If you are not shown as a member of any group to which you belong or have any concerns regarding the details shown for a group, please contact the Leader of that group.


To find out about those groups which you do not current belong to select the Groups tab. This then provides a list of all our groups which can (by selecting the appropriate tab) be displayed:

- Alphabetically
- By activity category
- By days of the week
- Those with vacancies (more relevant once Group Leaders use this feature)

By clicking on the blue link to a group you can find out some information about a group and use the icons to email the group leader -  or apply to join the group - .

The 'apply' icon will then either give the following message and you have to press the 'Apply to Join This Group' icon for your application to be submitted.

Apply To Join The Group

 Please click the button below if you would like to apply to join this group. The group leader will be notified of your request by email and will be in touch.

Apply to Join This Group

Your application will then be confirmed through an email (such as the one below) to you.

Simple Membership
Your application for the Local History group has been submitted successfully and the leader will contact you if necessary.

www.simplemembership.co.uk

If however the group has no vacancies the following message will be given.

Apply To Join The Group

This group does not currently have any vacancies and if it is operating a waiting list then this list is also full. By contacting the leader you are registering your interest to be a member of the group only.

Remember contact can be made with the group leader by emailing them, either to ask for information about their group or to establish when they envisage that there may be vacancies.

Events

Events (in our system) are one-off activities that groups arrange for their members or which are open to all of Charnwood u3a. They typically cover trips and monthly meetings.

Managing such Events through our membership system is new and this facility will become more used as Group Leaders become familiar with our system.

Clicking on the Events tab shows any Events (i.e. trips) you are signed up for, or on the Waiting List for, and whether you are the Event Organiser. Clicking on an Event name will show you details of the event. You may also be able to apply to join the Event or email the Event Organiser from the Event page.

Payments

This page shows your record of membership and other payments. It cannot be edited by Members.

It does not record payments made directly to Interest Groups, such as group subscriptions. It does however show annual subscriptions paid from August 2023.

NOTE: This page also shows whether or not you have signed up for Gift Aid on your subscription. If your tax status has changed, please ensure that you change this on your Personal Details (see above).

If you have any concerns regarding the details on this page, please first contact our Membership Secretary.

Emails

Clicking on the Emails tab shows recent emails that you have sent or received through the system. Clicking on the ⓘ symbol on the right hand side of the list against each item will reveal the details of the email.

My Roles

This lists any recorded roles, in addition to being a member, you have in Charnwood u3a.

My Calendar

The Calendar shows all the Groups and Events within our u3a that you are currently signed-up to attend. If a Group you are a member of does not appear in this calendar please contact the Group Leader as they may not have included you in their Group within the system.

(Once the use of Events is more established) if an Event you are attending does not appear in this calendar this may be because the Event Organiser has not updated the records in the system. If you are in any doubt please contact the relevant Event Organiser.

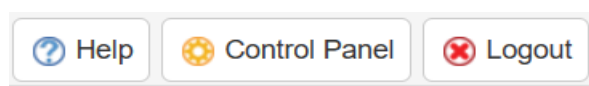
If you require further information on a Group or Event, please contact the relevant Group Leader or Event Organiser. This can be done from the Group and Event pages on this website.

Renew Membership

When your membership is due for renewal, you will be sent an email reminder with information on how to renew.

Help

Should help, in addition to this guidance, be required further advice can be found through the Help button on the top right of our web pages.



There is also more specific guidance covering other functions accessible in our web site.

Contact the Charnwood u3a Web System Support Team

For further advice and guidance contact either:-

- Martyn Speight - on webmanager@charnwoodu3a.org.uk
- Stephen Morris - on system@charnwoodu3a.org.uk