

# U-MAS User Manual for U3A Members

## UMAS Version: 6.0

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# Introduction

The U-MAS membership management system is widely used by U3As in Victoria. For members, the **U-MAS for Members** application allows you to manage your U3A membership and course enrolments online.

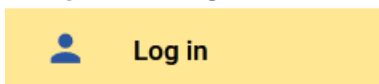
The manual is divided into two sections: one [for current and renewing members](#), and one [for new and prospective members](#).

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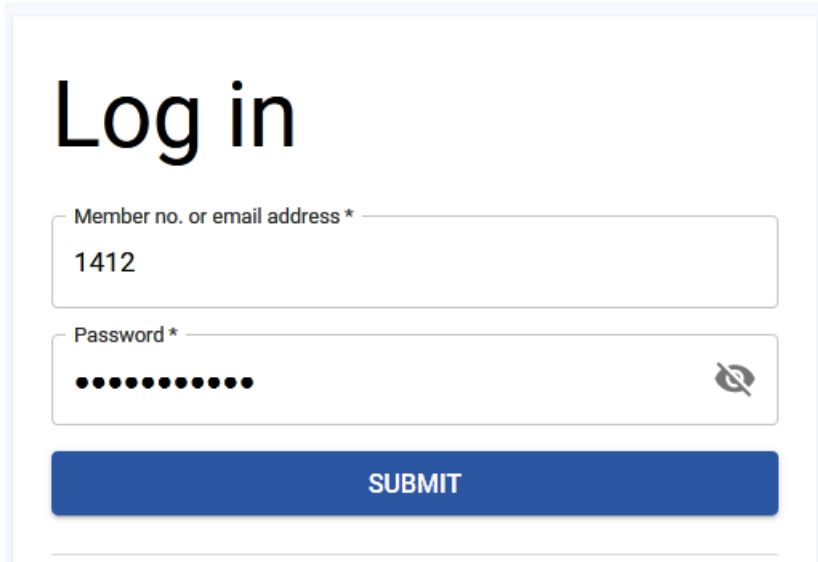
## For Current and Renewing Members

### How to log in

1. In your web browser, navigate to your U3A's website, and from there, find your way to your U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.  
If you don't know your U3A's website address (URL), try a Google search of the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.
2. Now go to the **Log in link** in the navigation menu:



3. Enter your membership number (or email address) and password, and click the **Submit** button.



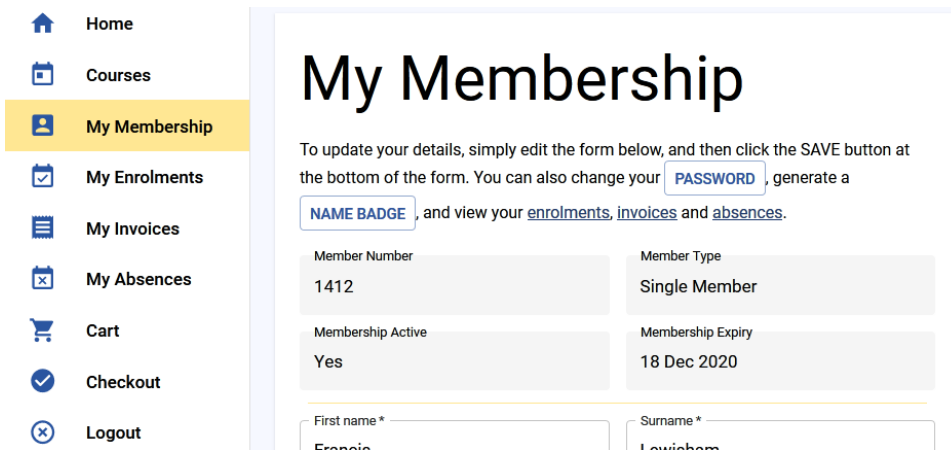
**Log in**

Member no. or email address \*  
1412

Password \*  
●●●●●●●●

**SUBMIT**

4. On successful login, you will your membership details, and some additional items will be available in the navigation menu.



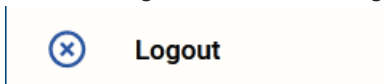
## Having trouble logging in?

The following sections in this user manual may help:

- Forgotten password, or need to reset password: See [What to do if you have forgotten your password](#).
- Forgotten membership number: See [What to do if you have forgotten your membership number](#).

## How to log out

1. Click the Logout link in the navigation menu:



## How to renew your membership

**To renew your membership, you need to enrol in one or more courses:** When adding courses to your cart, an appropriate membership subscription will be automatically added to the cart as well. After checkout, your invoice will be displayed, and paying this invoice will complete your membership renewal.

1. [Log in](#) to U-MAS for Members.
2. If you are not sure whether or not your membership needs to be renewed, check your member details on the *My Membership* screen: If the *Membership Active* field reads "No", and your *Membership Expiry* date is before today's date, your membership needs renewing.

Membership Active	Membership Expiry
No	20 Mar 2018

3. Enrol in one or more courses (see [How to enrol](#) in this user manual).
4. After checkout, view your invoice and pay your subscription fee (see [How to pay your fees](#) in this user manual).

## When can you renew?

Most U3As offer memberships on a yearly basis.

For most of the year (roughly January to November, depending on the U3A), you can renew your membership and enrol in courses for the current year.

Towards the end of the year (around November or December, depending on the U3A), most U3As will go through a "rollover" process: Memberships and enrolments for the current year will end, and the course timetable for the coming year will be published. During this process, there may be a few weeks where you can't enrol in courses or renew your membership.

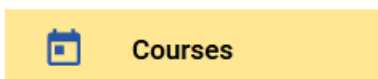
After a set date (determined by the U3A), enrolments will be opened, meaning that you can enrol in courses and renew your membership for the coming year. Most U3As will publish enrolment and term dates on their website and/or communicate this information via email.

## How to enrol

You must be a member before you can enrol in courses. Your membership does not need to be active before enrolling: If you have an inactive membership, the process of enrolling and paying your subscription fee will activate it.

If you don't have a membership, see the [How to join](#) section of this user manual.

1. [Log in](#) to U-MAS for Members.
2. Click the **Courses** link in the navigation menu.



A course list similar to this will be displayed:

**Courses** HELP

Current timetable (6 Jan 2020 - 20 Dec 2020)

Courses: 1-15 of 15 FILTER |< < > >|

**Category**  
**ART: Art and craft**

Course	Day of week	Dates
Oil Painting (Beginners)	Monday	20 Jul 2020 - 23 Nov 2020 <span>▼</span>
Oil Painting (Intermediate)	Tuesday	7 Jul 2020 - 17 Nov 2020 <span>▼</span>
Oil Painting (Advanced)	Wednesday	15 Jan 2020 - 27 Nov 2020 <span>▼</span>

**Category**  
**CIII · Culture**

- If you're unfamiliar with navigating the course list, click the **Help button** on the top right of the Courses page, or see the tips in the [How to View Course Details Without Joining](#) section.
- If you are interested in a course, **click on the course name** to open the course details.
- After viewing the course details, if you would like to enrol, click the **Add to Cart** button at the bottom of the course details.

<b>Availability</b>	Accepting enrolments? Yes Capacity: 15, enrolled: 10, available: 5, waitlisted: 0
<b>Fee</b>	\$0.00

**ADD TO CART** CLOSE

Note: If you are not eligible to enrol, or if you are already enrolled, you will see an explanatory note instead, and you will not be able to add this course to your cart.




- Repeat steps 4 and 5 until you have added all your preferred courses to your cart.

**Note that:**

- Some courses may be full, but accepting waitlist enrolments: You can enrol on the waitlist, and the U3A will let you know if a space becomes available.
  - Some courses may be finished or closed to enrolments: You can't enrol in these courses.
  - Some U3As limit the number of enrolments allowed per member, in the interests of fairness.
- View your cart:** Click the Cart link in the navigation menu, or in the page header: You'll see a list of your selected courses, like the example below.

### Cart

You do not have a current membership: A membership subscription will be automatically added to your cart if required.

	Code	Name	Start date	Status	Fee
	BUSH20	Bushwalking Group	20 Feb 2020	OK	\$0.00
	20OIL01	Oil Painting (Beginners)	20 Jul 2020	OK	\$10.00
	SUBS2020	2020 Subscription	20 Jan 2020	OK	\$30.00
<b>Total</b>					<b>\$40.00</b>

[CLOSE](#)   [CLEAR CART](#)   [CHECKOUT](#)

**Notes:**

- If you do not have a current membership subscription, a subscription will have been automatically added to your cart. The cost of the subscription is your membership fee, and depends on your membership type.
  - Most courses other than the membership subscription will incur no charge. However, occasionally a course may have a small additional fee to cover expenses such as supplies or travel costs.
8. Check the cart contents, and make adjustments if required.
    - If you would like to remove a course from your selections, click the bin icon in the appropriate row.
    - To remove all courses from your selections, use the Clear Cart button.
    - To add more courses to your selections, return to the Courses page, where you can add more courses to your cart.
  9. When you're ready to confirm your course selections, click the **Checkout** button.

**Note:** For some U3As, you may be required to agree to the U3A's terms and conditions before proceeding with checkout.

Our terms and conditions are [available here](#).

I agree to the U3A Western Peninsula Terms & Conditions

[VIEW CART](#)   [CHECKOUT](#)

10. On checkout success, your invoice will be displayed.

The invoice will include a list of the courses in which you have just enrolled, along with any membership subscription or other fees.

If a fee is payable and your U3A offers PayPal, a PayPal button will be available so that you can pay online immediately. Other payment methods, if available, will be listed at the bottom of the invoice.

The screenshot shows a 'Checkout success' message with a total due of \$40.00. It includes a 'DOWNLOAD PDF' link and a 'Pay with PayPal' button. Below this is an 'INVOICE' section with the following details:

<b>Invoice ID:</b> 1445-2080	<b>Test U3A Inc.</b>
<b>Date:</b> 21 Sep 2020	<b>Incorporation:</b> U3ATestInc
<b>Bill to:</b> Virginia Salter	<b>ABN:</b> 01 234 567 890
	<b>10 O'Brien St</b>

### Where to next?

**Paying your fees:** See [How to pay your fees](#) in this user manual for details on how to pay.

**Viewing your enrolments:** Go to **My Enrolments** in the navigation menu to see a list of your current enrolments. (Most U3As will also send you an email containing this information, at the time of enrolment.)

## How to pay your fees

For most U3As, you must [enrol in one or more courses](#) before you can pay your subscription fee.

### Payment methods

Different U3As offer different methods of paying fees: These can range from offline methods such as cash or cheque, to online methods such as PayPal.

If your U3A uses U-MAS but does not offer online payment methods, you will still be able to enrol online, but will need to download or print out your invoice and pay it separately.



1. After you have [enrolled](#) in at least one course, a membership subscription for the current enrolment period will be added to your account, and an invoice will be generated.
2. To access your invoice, [log in](#) if you're not already logged in, and then go to **My Invoices** in the navigation menu: Your recent invoices will be listed. Any that have outstanding amounts will be highlighted in red, and the amount owing will be displayed in the *Due* column.

3. Click on the appropriate invoice in the list, to open the invoice details.
4. Payment options will be displayed at the bottom of the invoice: These will depend on the payment methods offered by your U3A.

- **To pay offline, or by EFT (electronic funds transfer):**  
Click the **Download PDF** button at the bottom of the invoice, to generate a PDF of the invoice: You can save this on your computer or print it out to refer to when paying your invoice. Pay the invoice according to the payment methods offered by your U3A.
- **To pay online using PayPal,** you will need either a PayPal account or a credit card:  
Click the **PayPal** button at the bottom of the invoice: A PayPal dialog will open, where you can choose to either log in and pay with your Pay Pal account, or select *Pay with Debit or Credit Card* to use a

card without a PayPal account.

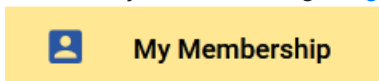
After paying, be sure to wait while the invoice updates.

5. Once your payment has been confirmed, your invoice in U-MAS for Members will update to show that it has been paid. You will usually also receive an email confirming your payment.

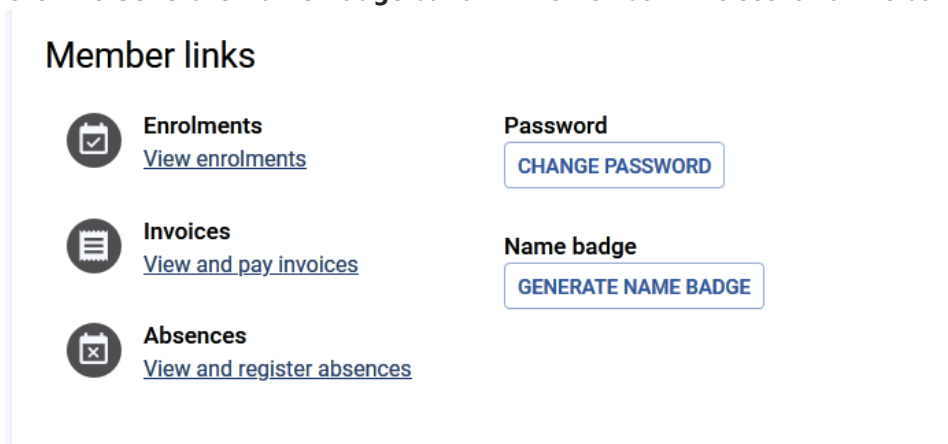
## How to print your name badge

Some U3As provide an option for members to print their own name badges.

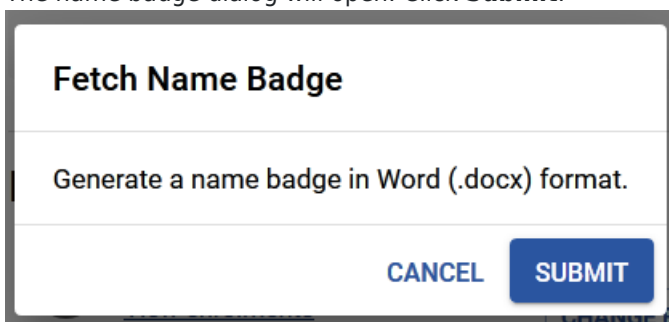
1. To access your name badge, [log in](#) if you're not already logged in, and go to **My Membership**.



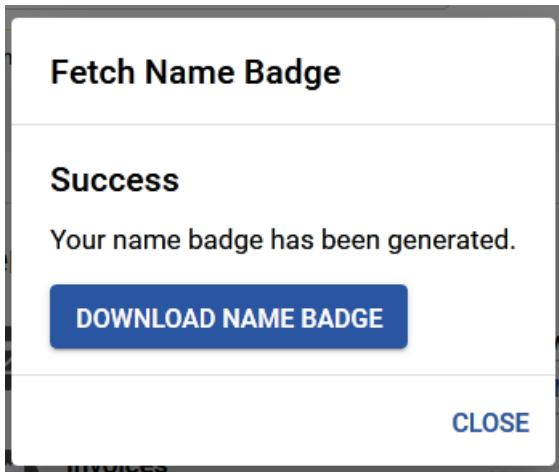
2. Click the **Generate Name Badge** button in the *Member Links* section at the bottom of the screen.



3. The name badge dialog will open: Click **Submit**.



4. Once the name badge has been generated, a download button will be displayed: Click **Download Name Badge** to download the document: You can open the document in Microsoft Word for printing.



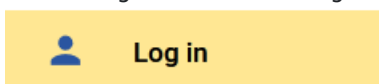
### If you can't see the "Generate Name Badge" button...

- Have you enrolled and paid your membership fee for the current year? If not, you will need to do this first: See the [How to renew your membership](#) section of this user manual.
- Your U3A may not have turned this feature on. Some U3As will provide name badges to members using a different method, such as by mail or email. Check with your U3A if unsure.

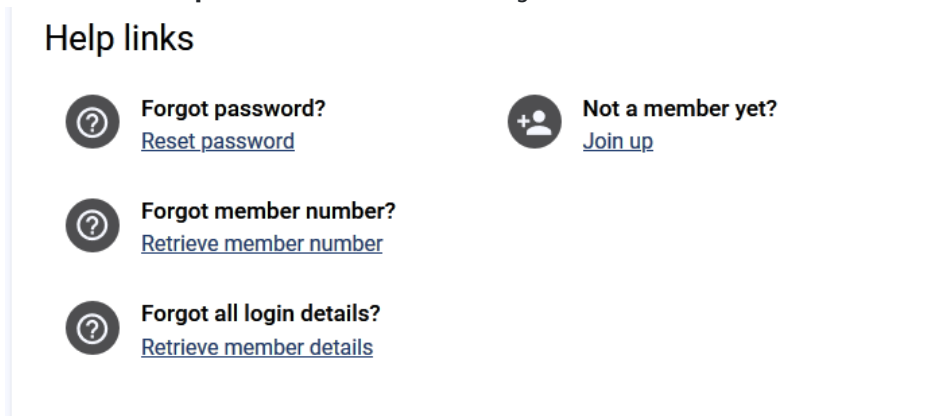
## What to do if you have forgotten your password

If you know your membership number and if you provided your email address when you joined up, a password reset authorisation code can be emailed to you:

1. Go the Login link in the navigation menu:



2. Click the **Reset password** link below the login form.



3. Fill in your membership number and surname, then click the **Submit** button: You will receive an email from the U3A including an eight-character authorisation code.

# Request password reset

Fill out and submit this form in order to receive a password reset authorisation code by email.

If you already have an authorisation code, you can [ENTER IT HERE](#) .

Member number \*

Surname \*

**SUBMIT**

**From:** U3A Western Peninsula <admin@u3awp.org.au>  
**Sent:** Monday, 21 September 2020 1:45 PM  
**To:** Virginia Salter <virginia.salter@me.com>  
**Subject:** U-MAS password reset

Dear Virginia Salter (member no. 1445),

Someone (presumably you) requested a password reset in U-MAS for Members. Below is your temporary authorisation code, which can be used in U-MAS for Members to authorise your password change.


**6741973e**


This code will expire in 20 minutes, at 2020-09-21 02:05:27 PM.

- 4. The next screen is the **Reset password** screen: Enter the authorisation code that was emailed to you.
- 5. Also enter a new password and confirm the new password, and then click the **Submit** button: Your password will be reset, and you can now proceed to log in.

Member number \*

Authorisation code \*

New password \*  

Confirm new password \*  

**SUBMIT**

**If you don't know your membership number, or if there is no email address associated with your membership**, then your U3A's membership coordinator or office volunteers will assist you: Follow the steps in this user guide under [What to do if you have forgotten both your password and your membership number](#).

## What to do if you have forgotten your membership number

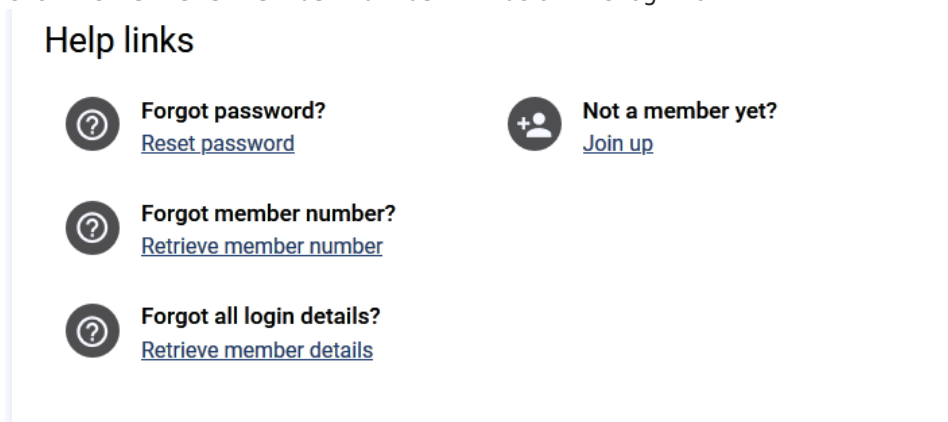
Firstly, it may help to do a quick search of your emails, looking for past correspondence from the U3A: Emails such as your New Membership email and subsequent course enrolment emails will usually include your membership number. If you can't find it, follow the steps below:

**If you know your password** you can quickly retrieve your membership number:

1. Go to the Login link in the navigation menu:




2. Click the **Retrieve member number** link below the login form.



3. Fill in your password, first name, surname and year of birth, then click **Submit**.

# Retrieve member number

Fill out and submit this form in order to retrieve your member number.

Password \* 

First name \*

Surname \*

Year of birth \*

**SUBMIT**

4. If a matching member number is found, it will be displayed, and you can proceed to log in with this number.

If you don't know your password, or if no matching member number is found, then the U3A's memberships coordinator or office volunteers will assist you: Follow the steps in this user guide under [What to do if you have forgotten both your password and your membership number](#).

## What to do if you have forgotten both your password and your membership number





U3A office volunteers will need to assist in retrieving your details. You can follow the steps below to send a message to the memberships coordinator. Alternatively, you can contact your U3A office directly.

1. Go the Login link in the navigation menu:



2. Click the **Retrieve member details** link below the login form.

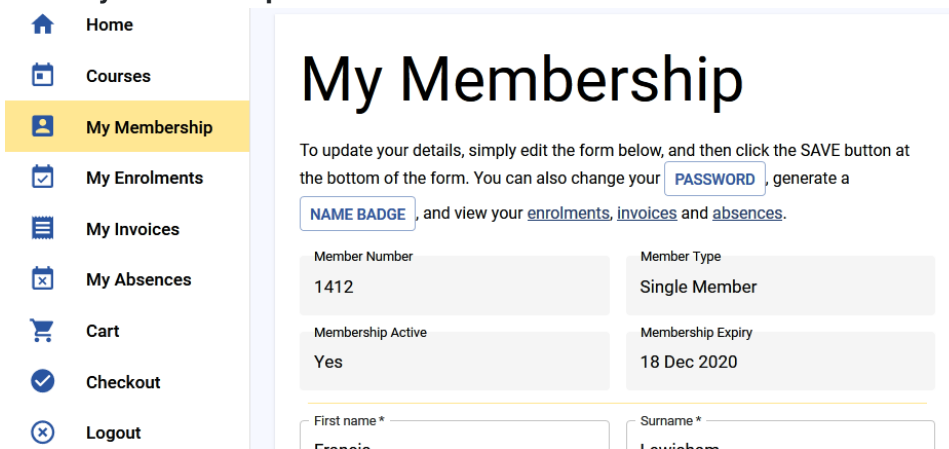
## Help links

-  **Forgot password?**  
[Reset password](#)
-  **Not a member yet?**  
[Join up](#)
-  **Forgot member number?**  
[Retrieve member number](#)
-  **Forgot all login details?**  
[Retrieve member details](#)

3. Fill in the form. (This information is needed so that U3A volunteers can find you in the membership database.)
4. Click the **Submit** button when finished.
5. Your message will be sent to the U3A memberships coordinator. U3A office volunteers will contact you and retrieve your membership details for you.

## How to update your details

1. [Log in](#) to U-MAS for Members.
2. Go to **My Membership**



3. On the My Membership screen, you can change your details including:
  - o Name, address, phone and email
  - o Emergency contact person
4. After making your changes, click the **Save** button near the bottom of the screen.

### Need to change course enrolment details?

You can enrol in more courses, so long as enrolments are open: See [How to Enrol](#) in this user manual.

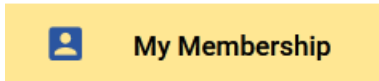
For all other enrolment-related changes, you'll need to contact the course coordinator or U3A office volunteers to make the changes for you.

## How to change your password

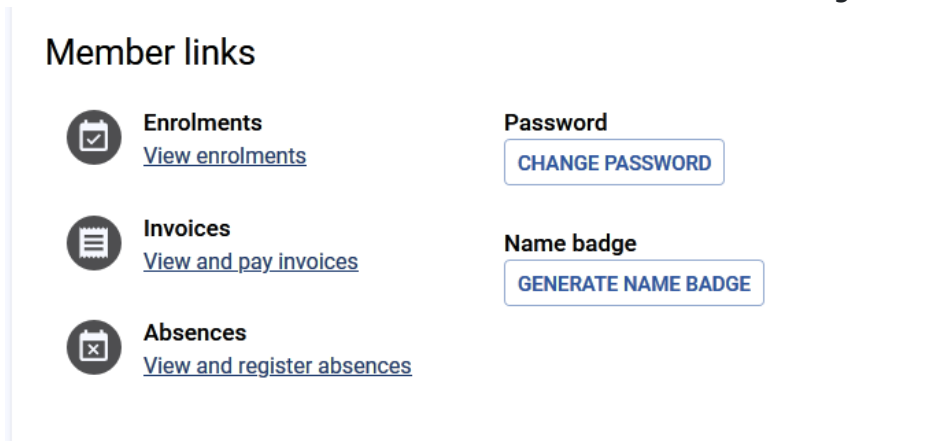
If you know your password and would like to change it, follow the steps below.

If you have forgotten your password, see [What to do if you have forgotten your password](#) in this user manual.

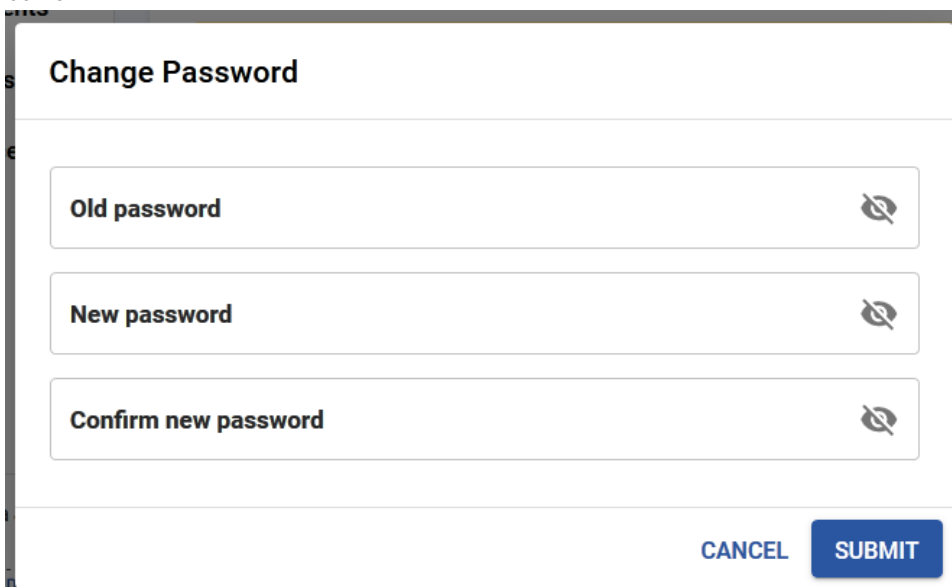
1. [Log in](#) to U-MAS for Members.
2. Go to **My Membership**



3. In the *Member links* section at the bottom of the screen, click the **Change Password** button.



4. Fill in the form with your old password, new password, and confirm new password. Then, click the **Submit** button.



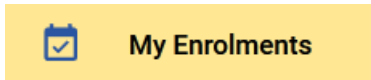
## What courses am I enrolled in?

This information is available from **My Enrolments**:

1. [Log in](#) to U-MAS for Members.



- Click the **My Enrolments** link in the navigation menu:



- On the My Enrolments screen, you will find:
  - A table showing your **Membership Subscriptions**
  - A table showing your **Enrolments**

**Tip:** By default, enrolments for the current timetable date range are shown. You can use the **Settings** button or the pencil icon to change the date range.

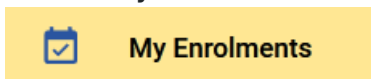
Enrolments					
6 Jan 2020 - 20 Dec 2020					
Code	Name	Start date	Start time	End date	Invoice
WRITE20	Writing your own story	8 Jan 2020	10:00 AM	17 Jun 2020	<a href="#">2003</a>
PAINT20	Oil Painting (Advanced)	15 Jan 2020	2:00 PM	27 Nov 2020	<a href="#">2021</a>
	Wine and Cheese	31 Jan		27 Nov	<a href="#">2021</a>

- A table showing your **Waitlist Enrolments**
- If you'd like to download a copy of your enrolments, use the **Download PDF** button: You can save the PDF to your computer or print it out.

## When does my course start?


This information is available from **My Enrolments**:

- [Log in](#) to U-MAS for Members.
- Click the **My Enrolments** link in the navigation menu:



- The **Enrolments** table displays the start date and time for each of your courses.

**Enrolments**

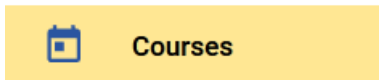
6 Jan 2020 - 20 Dec 2020 

Code	Name	Start date	Start time	End date	Invoice
WRITE20	Writing your own story	8 Jan 2020	10:00 AM	17 Jun 2020	<a href="#">2003</a>
PAINT20	Oil Painting (Advanced)	15 Jan 2020	2:00 PM	27 Nov 2020	<a href="#">2021</a>
	Wine and Cheese	31 Jan		27 Nov	<a href="#">2021</a>

## Where is my course held?

This information is available in the course timetable.

1. In U-MAS for Members, go to **Courses**.



2. Find the course in the timetable.

**Tip:** If you can't easily find the course, use the **Filter** button to sort and filter the displayed courses. For example, if the course is an Art course, you might untick all the other categories so that only Art courses are displayed.

**Course Display Settings**

**Show Timespan**  
Current timetable ▾

**Show Categories**  
TICK ALL    UNTICK ALL

**Exclude**

- Finished courses
- Full courses
- Closed courses

**Sort By...**  
Day of week ▾

**... Then By**  
Start time ▾

**Categories:**

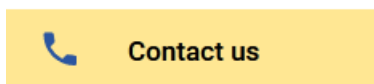
- ART:** Art and craft
- CUL:** Culture
- EXE:** Exercise
- GAM:** Games
- LAN:** Language and literature
- MUS:** Music
- OUT:** Outdoors
- Other / uncategorised

CANCEL    APPLY CHANGES

3. Click on the course name to display the course details. Here, you can find venue information, and other relevant details such as course dates and times.

## How do I cancel my enrolment in a course?

Please inform your U3A's course coordinator or office volunteers, and they will cancel your enrolment for you. Contact details are usually available by clicking the **Contact Us** link in the navigation menu, or by checking the U3A's website.




## How do I report my absence from a course?

Class tutors/leaders appreciate a warning if you know you will miss a class.

**Some U3As** provide an option for members to report absences through U-MAS. If available, you can do this through the **My Absences** link in the navigation menu:

1. [Log in](#) to U-MAS for Members.
2. Click the **My Absences** link in the navigation menu:

 **My Absences**

3. Fill in the form:
  - **Select Course:** Select the course from which you will be absent. Select *All Courses* if you will be absent from all courses.
  - **Select Reason:** The reason for your absence. Choose from "Holiday", "Illness" or "Other".
  - Enter the **Start Date** and **Finish Date**.
4. Click the **Submit** button: Your absences will be submitted, and your list of upcoming absences will be displayed below the form.

## My Absences

### Submit Absences


Select Course

All Courses ▼


Select Reason \*

Other ▼

Start Date \*

21/09/2020 

Finish Date \*

21/09/2020 

SUBMIT

### Current Absences

Course	Course Code	Start Date	Finish Date	Reason
Bushwalking Group	BUSH20	21 Sep 2020	24 Sep 2020	Holiday

### Can't see the My Absences link?

If this option is not available, your U3A will have a different method of reporting absences (such as informing the Course Coordinator or class tutor/leader directly). Check with your U3A if unsure.

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# For New and Prospective Members

## How to join

First, you need to sign up as a new member. After you have joined, you will be able to enrol in courses and pay your membership subscription fee.

Most U3As also allow offline joining, however online joining is the recommended method where possible.

### Note for previous members

If you are or have ever been a member of this U3A, even if your membership has lapsed, do not join up as a new member.

Instead, you should renew your membership: See the [How to renew your membership](#) section of this user manual.

1. In your web browser, navigate to the U3A's website, and from there, find your way to the U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.  
If you don't know the U3A's website address (URL), try a Google search for the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.
2. Click the **Join** link in the navigation menu.



3. Fill in the form. Fields marked with an asterisk (\*) are required.

**Join**

Fill out and submit this form in order to join U3A Western Peninsula & District.

1 — 2 — 3 — 4  
Part 1      Part 2      Part 3      Review, submit

**Part 1**

Member Type\*  
Single Member

First name\*      Surname\*

Preferred name

4. There are three parts to the form. Click **Next** at the end of each part.

### Choosing a password

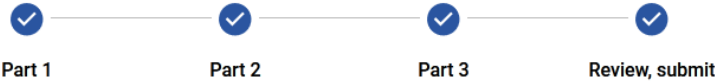
On part three, you will need to enter a password: It must be at least eight characters long, and contain a combination of upper and lowercase letters and numbers. Make sure you choose a password that is difficult to guess.

Keep your password safe: You will need it to log in to U-MAS.

5. **Review:** At the end of the form, review the information you have provided. If you need to change something, simply use the **Back** button at the bottom of the form to go back a step.
6. When you've finished, click the **Submit** button at the bottom of the form.
7. On successful submission, a message like this will be displayed:

# Join

Fill out and submit this form in order to join U3A Western Peninsula & District.



Part 1      Part 2      Part 3      Review, submit

## Success

Congratulations Ali, you have successfully joined U3A Western Peninsula & District.  
Your member number is:

**1472**

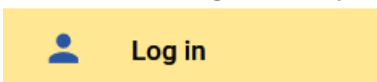
Please write your member number down before proceeding.  
You can now log in to U-MAS using your member number or your email address, and the password that you specified when joining up just now.

**LOG IN**

## Your membership number

The message will include your new membership number. You will need this number in future, so write it down.

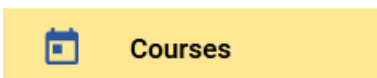
7. Congratulations, you have joined the U3A.  
Proceed to the **Log in** link if you would like to log in now.



Your next step is to enrol in one or more courses, and then pay your membership subscription fee. See the [How to enrol](#) section of this user manual for details.

## How to view course details without joining

1. In your web browser, navigate to the U3A's website, and from there, find your way to the U3A's membership management system (U-MAS). U3A websites vary, but most will have a link like "Member Login" or similar, that will take you to U-MAS.  
If you don't know the U3A's website address (URL), try a Google search for the U3A's name. Alternatively, contact the U3A's office volunteers for assistance.
2. Click the **Courses** link in the navigation menu.



A course list similar to this will be displayed:

# Courses

[HELP](#)

Current timetable (6 Jan 2020 - 20 Dec 2020)

Courses: 1-15 of 15
[FILTER](#)
|< < > >|


Category		
ART: Art and craft		
Course	Day of week	Dates
Oil Painting (Beginners)	Monday	20 Jul 2020 - 23 Nov 2020 <span style="float: right;">▼</span>
Oil Painting (Intermediate)	Tuesday	7 Jul 2020 - 17 Nov 2020 <span style="float: right;">▼</span>
Oil Painting (Advanced)	Wednesday	15 Jan 2020 - 27 Nov 2020 <span style="float: right;">▼</span>

Category

**CIII · Culture**

3. To more easily find courses that are of interest to you, using the **Filter** button. See [Tips](#) below for details.
4. To view the details for an individual course, click on the course name in the list.



 Indonesian (Beginners) 1:00 PM 1 Oct 2020 - 17 Dec 2020 ^

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**New!** Indonesian (Beginners) is a new addition to the timetable

Course code 20INDO01

Category LAN: Language and literature

Course type Short Course

Detail An enjoyable introduction to Indonesian language and culture

Additional information No prior knowledge necessary

Venue The Court House  
42 O'Brien St  
Healesville 3777

Timetable Weekly: Weekly Course  
Day: Thursday, 1:00 PM - 2:30 PM  
Dates: 1 Oct 2020 - 17 Dec 2020  
Next date: 1 Oct 2020

Availability Accepting enrolments? Yes  
Capacity: 12, enrolled: 0, available: 12, waitlisted: 0

Fee \$0.00

[CLOSE](#)

## Tips for using the course timetable

- **Sorting and filtering:** Use the **Filter** button at the top of the course list to open the course settings dialog:

### Course Display Settings

**Show Timespan**  
Current timetable ▾

**Exclude**

Finished courses

Full courses

Closed courses

**Sort By...**  
Day of week ▾

... Then By  
Start time ▾

**Show Categories**

**ART:** Art and craft

**CUL:** Culture

**EXE:** Exercise

**GAM:** Games

**LAN:** Language and literature

**MUS:** Music

**OUT:** Outdoors

Other / uncategorised

- **Show Timespan:** Choose the timespan to view. Options include "Current timetable", "this week", "next week", "next month", etc.
  - **Exclude:** Choose whether to exclude finished, full and/or closed courses.
  - **Sort By...:** Choose the top-level sort order. Options include "Category", "Day of week", "Course type", etc.
  - **... Then By:** Choose the second-level sort order.
  - **Show Categories:** Choose which categories to display. Available categories will vary depending on the U3A.
- **Icons:**
    - When you are logged in, any courses in which you are currently enrolled or waitlisted will be marked with a blue letter E or W respectively.
 

E

W
    - Any course that is currently in your cart will be marked with a yellow letter C.
 

C
    - Some courses may have an additional icon, depending on their status:
      - Closed to new enrolments: Grey lock icon.
      - Full and only accepting waitlist enrolments: Grey crossed icon.
      - New (recently added to the timetable): Blue star icon.



- **Help:** Click the **Help** button on the top right of the courses page for further information.

If you decide that you would like to enrol in a course, you need to first make sure that you are a member (see the the [How to join](#) section of this user manual if required), and then [log in](#) to [enrol](#).