

U3A CENTRAL COAST - MYU3A LEADER PORTAL

MYU3A GUIDANCE NOTES LEADER PORTAL – FOR U3A CENTRAL COAST

MyU3A is the name of the online computer system being used for the administration of U3A Central Coast. The system uses the term 'Tutor' which is now used interchangeably with the term 'Leader'.

NOTE: Any data displayed is fictitious and does not relate to anyone specific. It is just examples of how the data might look.

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1. Introduction

The MyU3A system is now in use by a number of U3As in Victoria and NSW.

NB To be able to use the system, Leaders and Members must have an email address registered with U3A Central Coast stored in the system.

There are two portals into the system for specific views of information and functionality. These are:

Member portal: to access data about yourself and the courses for which you are enrolled or waitlisted

And

Leader portal

2. Leader portal functions

Leaders are able to do the following:

- Manage students enrolled or waitlisted in their class (including the sequence of requests ie Waitlist by date)
- View and Print class attendance rolls
- Mark the roll (i.e. enter attendance into the system)
- View class attendance over a period of time.
- View student contact details including emergency contact details

These notes provide instructions to perform each of these functions.

3. Leader portal usage

Leaders have a number of options for using the system:

3.1 You can do it yourself on your laptop, desktop computer, tablet or smartphone OR

3.2 You can appoint a competent class assistant to perform the necessary tasks OR

3.3 You can continue to return the roll to U3A CC administration to perform these tasks. If you opt to use a class assistant, **you must advise U3A CC administration of that person's name** so that they can be set up on the system as a class assistant to enable them to login to mark the day for that class.

The functions that can be performed are:

- Class roll printing
- Roll marking including apologies
- Student contact list printing.

4. To Login to the LIVE Leader Portal

- a. Preferred Internet browsers are Mozilla Firefox, Google Chrome and Apple Safari. This is what you would normally use to access the Internet. Recent versions of Internet Explorer or Edge are also OK.
- b. **See section 8 for practising in a non-live database environment. It is recommended that you use the Practise database when you first start to use this system.**

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- c. Enter exactly this website address into the top URL/address box in your browser

<http://centralcoast.u3anet.org.au/> or search for U3A Central Coast

It must be in exactly this format. **Save it as a Favourite** website for ease of finding it next time.

- d. It takes you to the home page of the U3A Central Coast website. On the page you will see the link to Log in as a member or as a leader:

MEMBER – click to LOGIN

LEADER - click to LOGIN

- e. This is the screen that you will get next after you click at the Leader Login



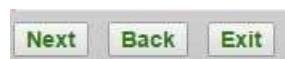
Each Leader will use their **Member Id and password** as the Leader Id and password. i.e. the same Id and password you use as a Member via the MEMBER LOGIN portal.

If you have forgotten your password go back to **MEMBER LOGIN**, enter your Member Id, then click **Forgotten Password**. Enter your email address as recorded in the database and click Send Password. A password will then be emailed to you if the email addresses match.

5. General Information




- a. After you log in, at the top of the screen, there is a notice saying “Welcome <first name> Live database (or else the Practise database. Important to observe this).
- b. There is a **Help** option at the bottom of your Classes screen. If you click on it, a new tab opens in the browser with help information. Read the instructions for assistance with each app such as Roll Marking. But ALWAYS follow local update rules. Remember to go back to the tab you used to access Help to continue using the system.

- c. Action buttons are usually at the bottom of the screen in this format.



or **Select** etc

Remember to always scroll down (or use CTRL/END or just END on a PC) to the bottom of the screen to see what action choices you have.

- d. The  button always quits the **Live Portal** (different from the Practise database) and takes you back to the **home page** of the U3A Central Coast website.
- e. DO NOT use the  button (Back) on the Browser. This can cause unpredictable results to the logic of the app you are in. Always select **Next** to proceed through the app, or **Exit** to quit the app.
- f. Selecting an item from a list is always done by clicking on the circle or square on the left of the line in the list and then clicking on  at the bottom of the screen. E.g.

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- g. Date entries may be in the format **d/m** or **dd/mm** or **dd/mm/yyyy**.

6. Class Profile

After you have logged in you will get a list of your classes. Note that you can only ever see your own classes.



Screen contents:

- Plc – maximum number of students requested in class
- Rsv – reserved – number of places not available for online enrolment (reserved for administration allocation)
- W/L – waitlisted – number of students on waitlist
- Enr – number of students enrolled.

Note that the **Help** option appears at the bottom of this screen.

Select the class you wish to look at by clicking on the circle to the left of the class name, then click on

Select to see the details of that class. This is the Class Profile screen.



The items in **green text** are called **apps** and these are function buttons that can be clicked. Each one enables an action to be performed for this class. The following sections look at each app in turn.

7. Apps for Leaders

7.1 Dates

This app should not be used by leaders. If the dates or venues need to be changed please contact U3A CC administration, the Venues Officer or the Course Leader Coordinator on 0404 704 701.

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7.2 Students - Enrolled & Waitlisted Students in the Class - app

Students

The **Students** app lists all members both enrolled and on the waitlist for a class. The **Requested** column shows the date this member was put onto the waitlist or removed from the class. The **Accepted** column shows the date of enrolment of confirmed members of the class.

Enrolment Status

242-02 2018 Films About Famous Artists Enrol from 02/07/2018

Venue: KINCUMBER NEIGHBOURHOOD CENTRE Kincumber Auditorium

Class Dates: 06/08/2018 thru 13/08/2018

Sessions: 1330 - 1530 Mon (weekly) Trms: 2

Options: StartEnr:02/07/2018 LastEnr:04/08/2018

Id	Name	Suburb	Phones	Email	Requested	Accepted
<i>The Accept button is now only available on the Waitlist Listing to ensure correct sequence of allocation.</i>						
<input type="radio"/>	2348 Den	BATEAU BAY	02 4332 83	den		24/06/2018
<input type="radio"/>	535 Pe	GREEN POINT	02 4365 07	1 the	24/06/2018 0:00	Waiting

Highlights: Withdrawn Offer Expired

Reason

Add (namekey):

Move to Class:

Waitlist:

Delete/Activate:

Places=50 Reserved=0 accepted=1 (1) requests=1 (1) Offers=0 Expired=0 withdrawn=0

u007(4)

7.2.1 **Add (namekey):** If you have no members waitlisted and a member requests to join your class after the enrolment period is finished:

- In the field after **Add (namekey):** type the first 3 characters (all lower case) of the applicant's surname, enter a reason (optional) and click **ADD**.
- A list of members whose names begin with the letters you entered is displayed.
- Choose the correct one by clicking on the radio button to the left of the name and click Select.
- The Enrolment Status screen will be returned and the name will be added to the list in alphabetical order either as an enrolment or request.

7.2.2 **Move to Class:** **Leaders must not use this function.** Please contact U3A administration if this is required.

7.2.3 **Waitlist:** **Leaders must not use this function.**

7.2.4 **Delete/Activate:** If a member on your list notifies you before the class starts that they are unavailable to attend,

- select the person, enter a reason and click **Del/Act**.
- The name will be deleted.
- If you make a mistake, use the ADD function to restore the student or **contact U3A CC administration to restore the student.**

The bottom of the screen gives you a summary of student status. The "requests" number is the number of those on the waitlist.

Click **List Waitlist** (see 7.2.5) to see the chronological sequence of the waitlisted members (see 7.2.5 below) and to **accept** Students into the class.

Click **Next** to return to the Class Profile

Click **Exit** to return to the U3A CC home page

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7.2.5 List Waitlist

If there are withdrawals from the class, offer a place in the class by email or phone to the first member on the list.

To add a student to the class from the waitlist,

myu3a01.myu3a.net/home/www/u3accp

Wait List

242-02 2018 Films About Famous Artists

Leader Margaret Ward 0434 9600000000730

Venue: KINCUMBER NEIGHBOURHOOD CENTRE Kincumber Auditorium

Class Dates: 06/08/2018 thru 13/08/2018 **Sessions:** 1330 - 1530 Mon (weekly) **Trms:** 2

Id	Name	Suburb	Phones	Email	Date	Time	
535	Pet Margaret Ward	GREEN POINT	02 4365 0730	m.ward@bigpond.com	24/06/2018	0000	Accept

Highlights: Online

Lines=1

Places=50 Reserved=0 accepted=1 (1) offers=0 requests=1 (1)

[Next](#) [Exit](#) u007(26)

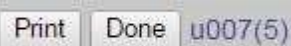
- Click **List Waitlist**. Students are in chronological order of requesting a place
- Click **Accept** and the member will automatically be removed from the Waitlist and added to the enrolled list.
- An email will be sent to the member automatically if they have an email address. Otherwise they should be advised by phone.
- Similarly, if a member contacts you, you can decide to Accept them if your venue and you can accommodate them.
- Reprint the roll or add the name by hand.
- If you wish to have a hard copy of the students on the Waiting List, please use CTRL/P (PC) or other print screen method.

Click **Next** to return to the **Enrolment Status** screen.

7.3 Tutor Info - List Student Contact & Emergency Details - [Tutor Info](#) app on Class Profile page

7.3.1 Click on [Tutor Info](#) to get an alphabetical list of all enrolled students together with their contact details and their emergency contact details. This is a useful list to always have a printed copy of in class in case of emergencies. Since it contains personal data **this should be kept private and destroyed when no longer needed**.

7.3.2 At the bottom of the screen you will see



Click on **Print** to format a printable copy –note that landscape orientation works best.

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myu3a01.myu3a.net/home/wwwu3acmx

Student Contact Information

Hi Mary,

Here is confidential information relating to your students. Please keep for use in emergencies.
Medical condition and emergency contacts follow each student's contact details.

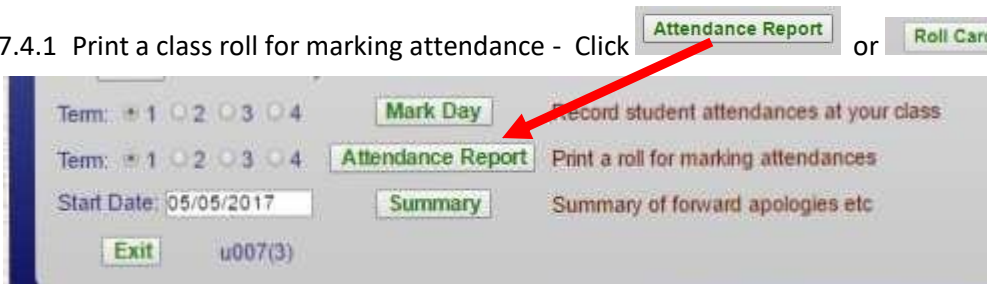
Class 107-01 Australian Artists of 20th Century KINCUMBER NEIGHBOURHOOD CENTRE 22 Kincumber St Kincumber Room: 3

Member	Name	Phones	Email	Paid	Status
370	Alice [redacted] asthma	02 4324 9999	alison@bigpond.com	Yes	Enrolled
	Don [redacted]	02 4324 9999			
2092	Dan [redacted]	0418 851 999 0418 851 999	don@bigpond.net.au	Yes	Enrolled
1982	Rod [redacted]	0429 510 999 0418 851 999	donron@bigpond.net.au	Yes	Enrolled
2368	Robbie [redacted]	0401 921 999	rromack@gmail.com	Yes	Enrolled

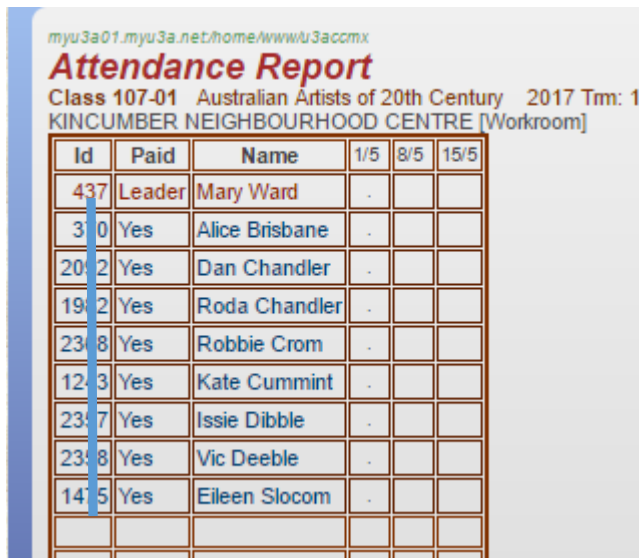
7.3.3 Click Done: return to the Class Profile

7.4 Attendance Report (if tick or initials sufficient) or Roll Card (if signatures required)

7.4.1 Print a class roll for marking attendance - Click **Attendance Report** or **Roll Card**.



All students are listed down the page with columns for each date of the current term.



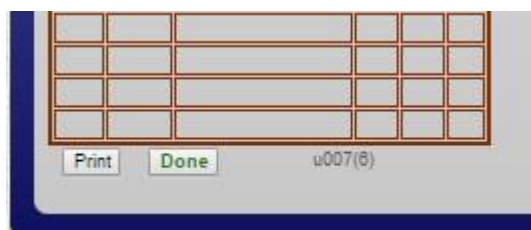
myu3a01.myu3a.net/home/wwwu3acmx

Attendance Report

Class 107-01 Australian Artists of 20th Century 2017 Trm: 1
KINCUMBER NEIGHBOURHOOD CENTRE [Workroom]

Id	Paid	Name	1/5	8/5	15/5
437	Leader	Mary Ward	.		
370	Yes	Alice Brisbane	.		
2092	Yes	Dan Chandler	.		
1982	Yes	Roda Chandler	.		
2368	Yes	Robbie Crom	.		
1243	Yes	Kate Cummint	.		
2367	Yes	Issie Dibble	.		
2368	Yes	Vic Deeble	.		
1475	Yes	Eileen Slocum	.		

Scroll down the screen and at the bottom you will see




7.4.1 Print

Click on **Print** to print this page of the class roll for the term. If there is a second page then click on **Next page** and print again for the remainder of the class roll. Make sure you format the page to print as either portrait or landscape.

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This is then used in the class for students to manually tick/sign the roll for the relevant date, or to indicate future apologies.


This information is used to enter the attendance details into the system, using the **Mark Day** app. See section 7.5.

7.5 Mark Day: If your class **has started** this button  will be apparent on the **Class Profile** screen

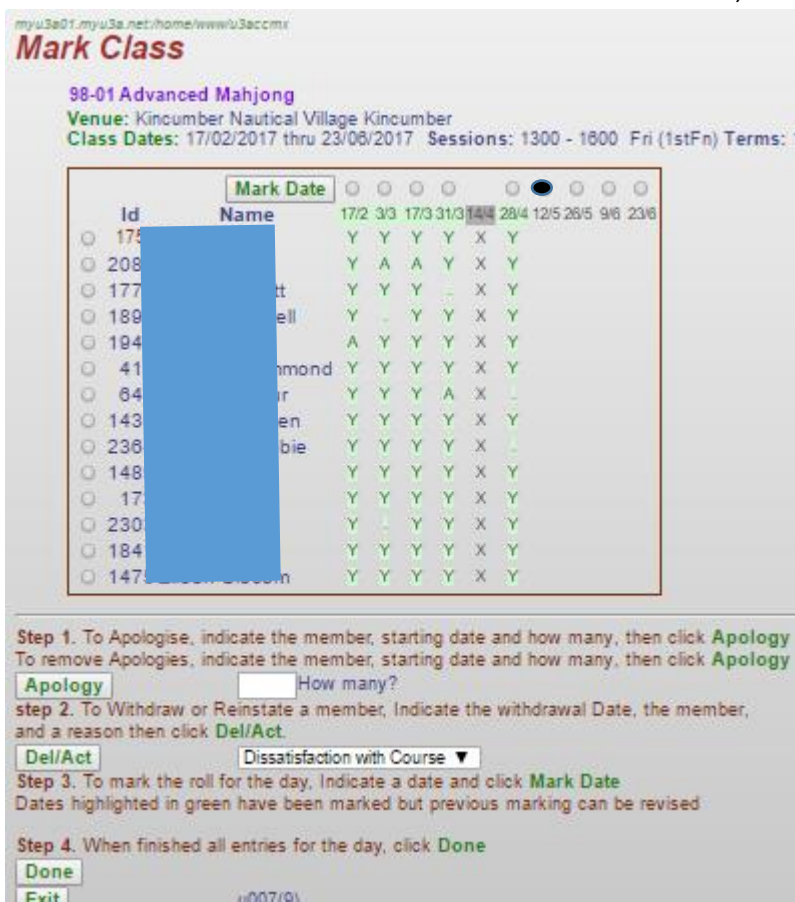
This function is to record the attendance at classes and can be performed by:

- The Leader
- The Class Assistant. If you have a class assistant, please let U3A CC administration know so that the assistant can be given access to log on to see the class.
- Administration

It can be done after each class or at the end of a course.

Click the radio button to select the term then click 

Depending on the time you choose to carry out the marking, the screen will look similar to the one below. Follow the directions on the screen,



Mark Class

98-01 Advanced Mahjong
Venue: Kincumber Nautical Village Kincumber
Class Dates: 17/02/2017 thru 23/06/2017 Sessions: 1300 - 1600 Fri (1stFn) Terms: 1

Id	Name	Mark Date											
		17/2	3/3	17/3	31/3	14/4	28/4	12/5	26/5	9/6	23/6		
<input type="radio"/> 175	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 208	[REDACTED]	Y	A	A	Y	X	Y						
<input type="radio"/> 177	[REDACTED]	Y	Y	Y	-	X	Y						
<input type="radio"/> 189	[REDACTED]	Y	-	Y	Y	X	Y						
<input type="radio"/> 194	[REDACTED]	A	Y	Y	Y	X	Y						
<input type="radio"/> 41	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 84	[REDACTED]	Y	Y	Y	A	X	-						
<input type="radio"/> 143	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 236	[REDACTED]	Y	Y	Y	Y	X	-						
<input type="radio"/> 148	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 17	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 230	[REDACTED]	Y	-	Y	Y	X	Y						
<input type="radio"/> 184	[REDACTED]	Y	Y	Y	Y	X	Y						
<input type="radio"/> 147	[REDACTED]	Y	Y	Y	Y	X	Y						

Step 1. To Apologise, indicate the member, starting date and how many, then click **Apology**
To remove Apologies, indicate the member, starting date and how many, then click **Apology**

Apology How many?

step 2. To Withdraw or Reinstate a member, Indicate the withdrawal Date, the member, and a reason then click **Del/Act**

Del/Act Dissatisfaction with Course ▼

Step 3. To mark the roll for the day, Indicate a date and click **Mark Date**
Dates highlighted in green have been marked but previous marking can be revised

Step 4. When finished all entries for the day, click **Done**

Done

Exit u007(9)

1. Enter an **Apology**:
 - 1.1 Click on the circle at Mark date above the **date** the apology applies to.
 - 1.2 Click on the circle adjacent to the member who has apologised
 - 1.3 **How many?** enter the number of consecutive days they have apologised for.
 - 1.4 Click **Apology**. You will get an **A** against that person's name for as many consecutive dates as the number of apologies you entered.
 - 1.5 Repeat this procedure for any other members with apologies.

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If you have incorrectly marked an A against someone, you can just repeat the action again and it will turn it off – it acts as a toggle switch on/off.

2. **Withdrawals.** Enter anyone who has withdrawn from the rest of the course after the first day.
 - 2.1 Mark the **date** from when the withdrawal took place, select the **member** and the **reason** for the withdrawal and click **Del/Act**. The dates will be filled with a W up to the end of the course.
 - 2.2 Errors can be reset, as *it acts as a toggle switch on/off, unless the withdrawal is recorded from the first day in which case the student will no longer be visible in this app*. Please contact U3ACC administration if you have made a mistake.

3. **Mark Attendances by Day.** Select the relevant class **date** at the top of the screen

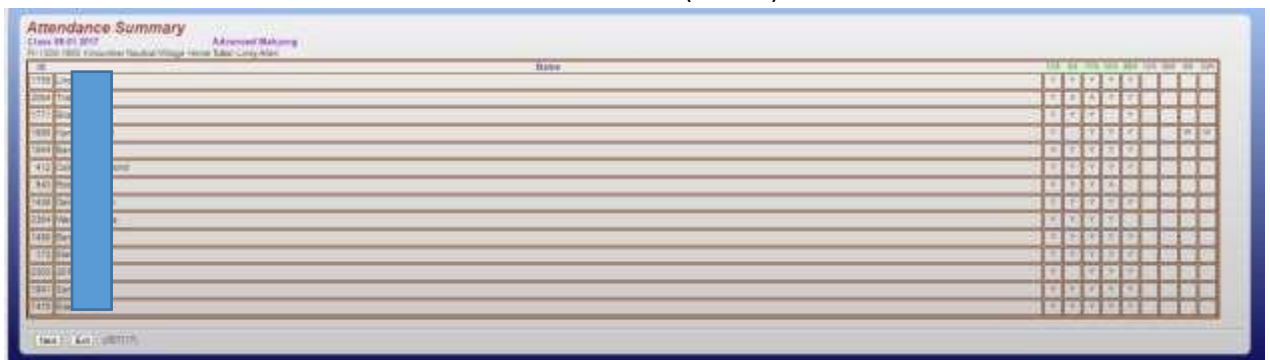
- 3.1 Click on which is also at the top of the screen.
- 3.2 All the remaining students will be ticked as present for that day
- 3.3 If any of these students did not attend, click each tick for all the missing students.
- 3.4 Click and return to the Class Profile

If you had made a mistake you can click Mark Day again for the relevant date. Reset the marked values and tick relevant ones again.

7.6 Review class attendance across a period - app

The app provides a view of actual class attendance across a specified time

period. By overwriting the start date (dd/mm/yyyy) and clicking **Summary**, you get a report in the same format as the Attendance Report but starting from the date you have specified. It is a historical view rather than a future view. This is useful for assessing absences and hence potential place offerings to students on the waitlist. It also shows students who have withdrawn from the class (as a W).



The screenshot shows the 'Attendance Summary' app interface. At the top, it displays 'Attendance Summary' and 'Class 88-01 2017'. Below this is a table with columns for 'Name', 'Date', and 'Attendance'. The table lists student names and their attendance status for various dates. A blue vertical bar is visible on the left side of the table, likely representing a selection or filter. The table data is as follows:

Name	Date	Attendance
1119	01/06/2017	W
1120	01/06/2017	W
1121	01/06/2017	W
1122	01/06/2017	W
1123	01/06/2017	W
1124	01/06/2017	W
1125	01/06/2017	W
1126	01/06/2017	W
1127	01/06/2017	W
1128	01/06/2017	W
1129	01/06/2017	W
1130	01/06/2017	W
1131	01/06/2017	W
1132	01/06/2017	W
1133	01/06/2017	W
1134	01/06/2017	W
1135	01/06/2017	W
1136	01/06/2017	W
1137	01/06/2017	W
1138	01/06/2017	W
1139	01/06/2017	W
1140	01/06/2017	W
1141	01/06/2017	W
1142	01/06/2017	W
1143	01/06/2017	W
1144	01/06/2017	W
1145	01/06/2017	W
1146	01/06/2017	W
1147	01/06/2017	W
1148	01/06/2017	W
1149	01/06/2017	W
1150	01/06/2017	W
1151	01/06/2017	W
1152	01/06/2017	W
1153	01/06/2017	W
1154	01/06/2017	W
1155	01/06/2017	W
1156	01/06/2017	W
1157	01/06/2017	W
1158	01/06/2017	W
1159	01/06/2017	W
1160	01/06/2017	W
1161	01/06/2017	W
1162	01/06/2017	W
1163	01/06/2017	W
1164	01/06/2017	W
1165	01/06/2017	W
1166	01/06/2017	W
1167	01/06/2017	W
1168	01/06/2017	W
1169	01/06/2017	W
1170	01/06/2017	W
1171	01/06/2017	W
1172	01/06/2017	W
1173	01/06/2017	W
1174	01/06/2017	W
1175	01/06/2017	W
1176	01/06/2017	W
1177	01/06/2017	W
1178	01/06/2017	W
1179	01/06/2017	W
1180	01/06/2017	W
1181	01/06/2017	W
1182	01/06/2017	W
1183	01/06/2017	W
1184	01/06/2017	W
1185	01/06/2017	W
1186	01/06/2017	W
1187	01/06/2017	W
1188	01/06/2017	W
1189	01/06/2017	W
1190	01/06/2017	W
1191	01/06/2017	W
1192	01/06/2017	W
1193	01/06/2017	W
1194	01/06/2017	W
1195	01/06/2017	W
1196	01/06/2017	W
1197	01/06/2017	W
1198	01/06/2017	W
1199	01/06/2017	W
1200	01/06/2017	W

8. To PRACTISE using this Leader Portal system

- Before you go into the LIVE database by following the instructions in Section 5 below, you can use a **Practise database** to practise in. **The Practise database is refreshed daily with the data from the Live system, so you cannot permanently cause any damage.**
- Preferred Internet browsers are Mozilla Firefox, Google Chrome and Apple Safari or a recent version of Internet Explorer or Edge. This is what you would normally use to access the Internet. If you normally use another and have a problem with the system, try using one of the above.
- Enter <https://myu3a01.myu3a.net/CentralCoast/startup.html> into your Internet browser's address area.
- This brings up the following screen:



- The **Practise** row has an “Admin” button and an “On line”. Click on the **On line** button and you will get this screen:



- You will note that it says “**Practise Database**” at the top. You can try things out here without in any way impacting the Live database.

- Click on the **Tutors (Leaders)** button and this is the screen that you will get next.

Each Leader will use their **Member Id and password** as the Leader Id and password. i.e. the same Id and password you use as a Member via the MEMBER LOGIN portal. **Note that the same Id and password work in both the Live database and the Practise database.**

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If you have forgotten your password click on **MEMBER LOGIN** in the Home page of U3A CC website, enter your member Id and click **Forgotten Password**. Enter your email address. Your password will then be emailed to you if the email address you entered is the same as in the database.

- h. To practise, follow the instructions from section 6 onwards in the same way as in the Live database. Note that **Exit** will return you to the screen in 4e unlike in the Live database it will return to the U3A CC website.