



Buckingham U3A Simple Membership System

Events – How to Set Up and Manage

Events – Setting Up and Managing - Group

Events – Setting up and Managing:

The membership system has a facility for you to set up Group or other events, manage attendees, and respond to enquiries.

This can be found in the group Editing icons - click on the Add Event icon to add a new Group Event.

Next screen shows what happens then.

Note: Group Events set up in a group will appear on the Group page by default, but they will also be visible on the relevant page under Events on the top Menu on the site.

You can decide if members are able to apply to attend or you can send invitations to them.

Book Group 2 Group







Time	-	10:30 to 11:45
Week	-	Third
Day	-	Monday
Group Leader(s)	-	Julia Morten and Dorothy Morgan, email: book.group2@buckinghamu3a.org.uk
Venue	-	House
Vacancies	-	1

Group Leaders

FIRST NAME	SURNAME	EMAIL
Julia	Morten	book.group2@buckinghamu3a.org.uk

Events

NAME	DATE	TIME
Book Group Meeting	16 Jan 2023	10:30

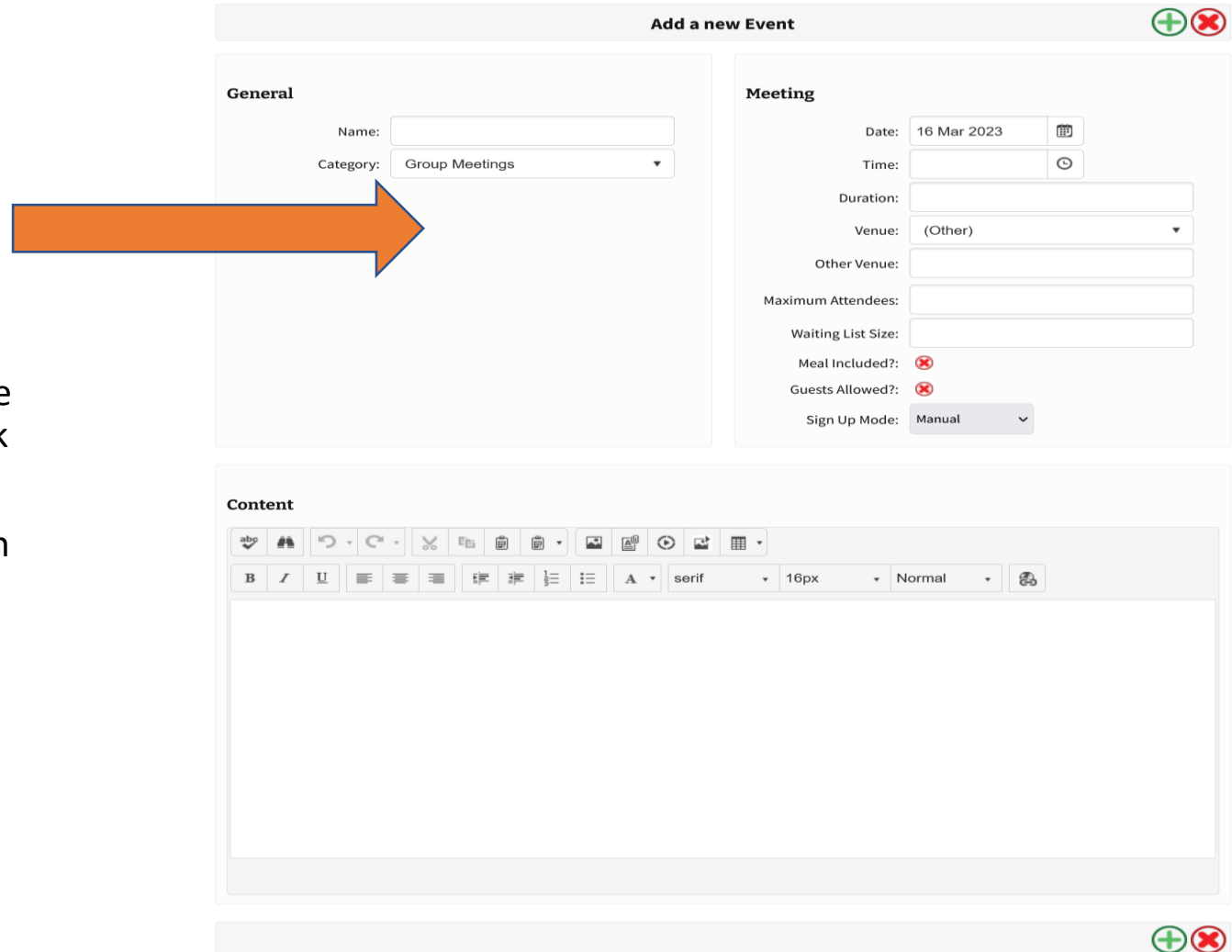
Next Step:

Select type of event **from the drop-down list**. In this case it's a Group Event. If you don't do this then it appears in the Open Meetings list and is visible to non-group members.

Then choose the date, the time - you will see a time and calendar selection when you click on the icons.

Then Choose the Venue from the drop-down list. *Note: last category shown is not in usage.*

Next 2 screens show you what comes up in more detail.



The screenshot displays the 'Add a new Event' form, which is divided into three main sections: General, Meeting, and Content. The form is titled 'Add a new Event' at the top right, with a green plus icon and a red minus icon. The 'General' section contains a 'Name' text field and a 'Category' dropdown menu, which is currently set to 'Group Meetings'. An orange arrow points to this dropdown menu. The 'Meeting' section contains several fields: 'Date' (set to '16 Mar 2023' with a calendar icon), 'Time' (with a clock icon), 'Duration' (text field), 'Venue' (dropdown menu set to '(Other)'), 'Other Venue' (text field), 'Maximum Attendees' (text field), 'Waiting List Size' (text field), 'Meal Included?' (checkbox with a red 'X'), 'Guests Allowed?' (checkbox with a red 'X'), and 'Sign Up Mode' (dropdown menu set to 'Manual'). The 'Content' section features a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and table. Below the toolbar is a large text area for content entry. The form is also decorated with a green plus icon and a red minus icon at the bottom right.

Add a new Event

General

Name:

Category:

Meeting

Date:



Time:




Duration:

Venue:

Other Venue:

Maximum Attendees:

Waiting List Size:

Meal Included?: 

Guests Allowed?: 

Sign Up Mode:

Select appropriate category from Drop-down Menu – Group Meetings are further down, see this image:

Category:

Group Meetings

Open Meeting

Group Meetings

Social

Special Events

Committee

You can choose to Include a Meal or Guests

Also amend the Sign Up mode. Manual allows you to email attendees. You can allow them to sign up themselves if they wish, and the system won't allow more than the attendees number you set.

Next:

Here you choose the venue. Then add information about attendees – how many and waiting list. Click to show if there is a meal or not, and how they can apply. Note if you select manual you will get chance to email attendees to tell them about it.

Date:	09 Dec 2022	
Time:		
Duration:		
Venue:	Ask leader ▼	
Other Venue:		
Maximum Attendees:		
Waiting List Size:		
Meal Included?:		
Guests Allowed?:		
Sign Up Mode:	Apply to attend ▼	
	Manual	
	Apply to attend	
	Self signup	

Add a new Event

Meeting

Date:	09 Dec 2022	
Time:		
Duration:		
Venue:	(Other) ▼	Venue
Other Venue:	Ask leader	
Maximum Attendees:	B'ham Athletic Football Club	
Waiting List Size:	Buckingham Community Centre	
Meal Included?:	Buckingham Golf Club	
Guests Allowed?:	Buckingham Youth Centre, London Road	
Sign Up Mode:	Community Room (Lib)	
	Cote Barn (The Woolpack)	
	Cote, Woolpack	
	Council Chamber Community Ctr	
	Cricket Pitch Bourton Road	
	Embleton Way Community Centre	

Saving:

Add the description of the event at the foot of the screen in the Content area, and save it by clicking on the green cross:

Going back to the main page for the Event you can enter the names of attendees by searching for their names in the list – in the same way as adding members to your group.

You can email attendees if required.

Finance can also be dealt with in Events but will be explained in another guide, it is not yet enabled.



Content

abc ✓	👤	↶	↷	✂	📄	📋
B	<i>I</i>	<u>U</u>	≡	≡	≡	≡

Describe Your Event Here

Then Click on Save - green Cross

Group Event Shown Above Group Information



Time	- 10:30 to 11:45
Week	- Third
Day	- Monday
Group Leader(s)	- Julia Morten and Dorothy Morgan, email: book.group2@buckinghamu3a.org.uk
Venue	- House
Vacancies	- 1

Group Leaders

FIRST NAME	SURNAME	EMAIL
Julia	Morten	book.group2@buckinghamu3a.org.uk
Dorothy	Morgan	book.group2@buckinghamu3a.org.uk

Events

NAME	DATE	TIME
Book Group Meeting	16 Jan 2023	10:30

We will recommence meeting in the New Year on the 3rd Monday of the month at 10.30 a.m. We are limited to 10 members due to the size of the sitting room. We all suggest various books to read, and the choice for each month will be introduced by the member who recommended it, to start the discussion. Here are some [Reviews](#) of books chosen by another U3A Book Group. Would also recommend a BBC Programme called Between the Covers, which is a discussion led by Sara Cox on a variety of book choices each week, including her guests choices. Website is [here](#) and there is a list of 16 Winter Reads available from the page.

The list will appear on this group page, and will be updated as we reach the next set of books to be chosen. We have 2 selections for 2023 and will choose some more at the first meeting in the New Year. Dorothy Morgan takes care of the technology such as email to members, and Julia Morten is the host for the group. Other members will host our meetings from time to time, and we will update this page if the venue changes.

Current Choices taking us into 2023 are as follows:-

New icon – “Add event”

NB: Finance for group events not enabled.

Once an “event” is created the Group Events are listed above the general information about the group, under the contact details.

Click on the event name to take you to the Group Event page

You can select the date and time to suit, as well as number of attendees – usually the maximum in the group.

Group Event Icons



Email Event
Organisers



Email Event
Attendees



View Event
Details



Group Event
Finance



Manage Event
Attendees



Edit Event

Manage Event Attendees by Clicking on the Manage Attendees Icon – the group member list appears on the left to select individually or as a Group. The Organiser can be identified in the same way as a GC with a Tick against their name.

Manage Event Attendees - Yoga 1 - May/July

Members

Search Members... X Search Members... X Save Waiting List Order

1874 - Richard Aston
3861 - Bar Bailey
841 - Donald Bone
4099 - Cathy Bruderer
1035 - Joan Chadwick
240 - Joy Harrop
4332 - Steph Kay
4321 - Cynthia Kelly

Available Members (15)

☒ 1009 - Shirley Catherall
☒ 1110 - Barbara Rogers
☐ 4311 - Karen Allen
☐ 25 - Betty Burke
☐ 3373 - Lynn Halliburton
☐ 1082 - Millicent Isherwood
☐ 120 - Cynthia Kelly
☐ 220 - Betty Burke

Attendees (14/15)

Waiting List (0/2)

Information: Add the event attendees from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Event Organisers. If the event capacity has been reached members will be added to the waiting list in the right column. They can be added to the event as soon as the number of members in the middle column is less than the event capacity.

Group members appear in the left hand column.

To add a member to the “event” click on their name to highlight then use the right arrow between the columns to add them to the “event”

Event participants are in the middle column.

Event Waiting List (if any) members are in the right hand column.

For other types of events the attendees will need to be added from the list of All Members before you can invite them.

Selecting Members to Add to Event:

In a group, just the specific group members will appear. In other Events, All Members will be visible in the list. You can use the drop-down menu to select All Members and add them to the middle section using the double arrow. If its just a few attendees, you can just search at top left to find them, double click on name to add. Anyone without email cannot be selected. See later information on emailing Attendees.

To: All Members ▼

Search Members

Available Members (2)

Search Members...

Attendees (10/10)

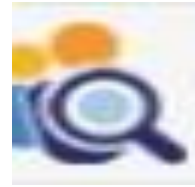
Save Waiting List Order

Waiting List (0/0)



Add the event attendees from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Event Organisers. If the event capacity has been reached members will be added to the waiting list in the right column. They can be added to the event as soon as the number of members in the middle column is less than the event capacity.

Use the Events Details Icon to print a Register or see Emergency Information



Event Details - Yoga 1 - May/July					
Event Attendee Details - Yoga 1 - May/July					
Membership No	Name	Email	Phone	Emergency Name	Emergency Number
1009	Shirley	[REDACTED]	01270 [REDACTED]	[REDACTED]	01270 [REDACTED]

The Event Details page provides a full list of participants with their Emergency Contact information

Print - Emergency Contact information

Registers can be downloaded by using either of the following icons
“Create Event Register Excel” or
“Create Event Register”

Email Group Event Attendees:



Override the Sender Name with your Title and email address

Email Event Attendees

From:

Override Sender Name: Override Sender Email:

To:

1009 - Shirley Catherall	<input type="button" value="→"/> <input type="button" value="←"/> <input type="button" value="↔"/>	<input type="text" value="Search Members..."/>
1110 - Barbara Rogers		
4311 - Karen Allen		
25 - Betty Burke		
3373 - Lynn Halliburton		
1082 - Millicent Isherwood		
120 - Cynthia Kelly		
220 - Pat Leydon		
Event Attendees (13) (1 postal members)		
Selected Members (0)		
Members without a valid email address cannot be added as recipients		
Subject: <input type="text" value="Yoga 1 - May/July Event Message"/>		
Attachments: <input type="button" value="Select"/> Select files to upload .jpeg,.jpg,.png,.gif,.doc,.docx,.xls,.xlsx,.pdf,.rtf,.txt		
Content:		

Emails can be sent to the “event” participants using the “Email Event Attendees” icon.

This works in the same way as the general group email. **Put in the correct “from address” at the top in the “override sender email” box before you send it!**

NB: Members without email are identified and should be contacted by phone.

To: ▼

Email Event Organiser:

If no **Organiser** is identified in the Event set-up process, then the Email Organiser function is not available to applicants.



Email Event Organisers

EMAIL INSTRUCTIONS:

1 - To Apply to Attend an Event (Just Yourself) Send the pre-written email below by clicking the **Send Email** button at the bottom that's all. The organiser will reply within a few days to advise if a place has been reserved for you and give payment options. Applications will be dealt with in the order in which they are received.

2 - To Apply for Yourself Plus One Other Member You can also apply and pay for one additional member. Please add their name and membership number under further details at the bottom of the email. You will receive an email giving payment options for both yourself and the additional member.

3 - To Ask the Organiser a Question rather than applying to attend, just delete the current content and compose and send your message.

Subject: Enquiry about Yoga 1 - May/July by Paula Reilly-Cooper

Content:

Dear Event Organiser,

I wish to apply to attend the Yoga 1 - May/July Event. Please confirm as soon as possible if you are able

When members are logged into the website, they can choose the event from the Groups webpage and use the “Email Event Organiser” icon to apply to join the event or ask for more information.

Instructions are contained within the blue box and the email is prepopulated with the specific group members details. They just need to amend and /or add any questions they may have.

If the event is cancelled, anyone signed up will get an automatic notification sent by the system.

You can go back in and Edit the event at any time, also delete it and hide it as required.

Other Types of Events can be managed from the Category in the drop-down list.

The first page under Events is Open Meetings. This can be seen without logging in, but members need to log in to see full details.

The principle is the same as with Group meetings, click on Add Event and follow the same process.

You can select the number of attendees, whether they can apply themselves, and whether you want to invite them by email.

One point to be aware of is that for such a big meeting the number set needs to be the same as the All Members total, to allow bulk emailing to be sent to All.

If the event is cancelled, anyone signed up will get an automatic notification sent by the system.

You can go back in and Edit the event at any time, also delete it and hide it as required.

Buckingham & District U3A

University of the Third Age

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[Open Meetings Page](#)

Edit

Here are the details of our forthcoming Open Meetings, at which we welcome our existing members and guests who may be interested in joining the Buckingham & District U3A.

The Group events found on other pages (use the drop down menu to see them) are available for members of those groups or for people interested in joining them, by previous arrangement with the Group Leader.

Add a new Event

EVENT NAME	DATE	TIME	DURATION	LOCATION	
New Year - January Open Meeting	25 Jan 2023	14:30	1.5	Buckingham Community Centre	
February Open Meeting	22 Feb 2023	14:30	1.5	Buckingham Community Centre	