

# U-MAS Tutor Booklet

## January 2024

Incorporating UMAS Version 6:07

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This booklet for tutors is designed as a quick start guide in using the U3A Batemans Bay membership system, U-MAS, to perform day-to-day course management tasks. Tutor functions are performed in the administration side of the U-MAS system which has a somewhat different look and feel to U-MAS for Members. The hope is that tutors will be less reliant on course coordinators once they become familiar with the course management features of U-MAS.

It is very important that you are sufficiently comfortable using the system for course management tasks before the start of your course. Hopefully, you will feel confident enough to work through the booklet independently at home. However, please see the contact email at the end of this introduction if you need extra assistance.

In U-MAS your roll for the class is called a Course Attendance List; Class Enrolments is called a Course Enrolment List. In this booklet we will use the words 'course' and 'class' interchangeably.

U-MAS does not have online class rolls. It allows tutors to print an attendance sheet for class participants to sign or initial. The hardcopy attendance sheets should be kept in accordance with the Tutor Handbook and U3A Batemans Bay policy. Presently you are asked to either email or post them to Coordinator 1 at either the end of your course or at the end of each term.

One benefit of U-MAS for Members is that it is intuitive enough for many members to manage their own enrolments and we hope that this will reduce the work for tutors. To this end, we are requiring members to enrol themselves in courses either independently online or by coming to Registration Day or Shopfront for assisted enrolment.

Tutors can no longer enrol members in courses. However, tutors have full control over course numbers, within venue capacity constraints, and can elect to (a) allow automatic enrolment into the course if a vacancy exists; or (b) restrict enrolments to those approved by the tutor, by operating an initial wait-list. This will be explained in this booklet.

Advantages of the U-MAS system:

- tutors can edit many of the course details in U-MAS, lessening their dependence on course coordinators. We ask that you review your course entry from time to time to ensure it remains current.
- **Please note** that only Course Coordinators can change the:
  - venue
  - start and finish times
  - course dates
- course coordinators have set up courses for school terms minus public holidays, or as requested by each tutor. If there are other dates that you plan to be away and not teaching, please let Lyn (Coordinator 1) or Amanda (Coordinator 2) know and they

can remove those dates from the schedule and inform the venue. It is good practice to make a note of this in the course description.

- members can record their absences from class, online in U-MAS. When this is done the system will notify the tutor by email, showing the absence date range recorded by the member. Tutors can also generate a report to check on all upcoming recorded absences. It will take time for members to become familiar with absence recording and we expect that some members will continue to telephone or email tutors direct. You can remind your classes of the U-MAS absence recording feature if this is your preferred way of working.
- U-MAS makes it easy to send class emails, including emails with attachments. Please avoid large and multiple attachments.

Early Enrolment:

Tutors are eligible to enrol in courses early. They will be able to do so on the day before Registration Day. In 2024, the system will open for early enrolments at 8am on 23rd January.

Once we are up and running in Semester 1, U-MAS will email the tutor whenever a member enrolls in their course, withdraws, or records an absence. This notification feature will be turned on *after* Registration Day so that tutors are not overwhelmed by email notifications when the bulk of enrolments are taking place.

If you need U-MAS system help beyond what is contained in this guide please send an email to [info@u3abatemansbay.org.au](mailto:info@u3abatemansbay.org.au)

For Coordinator assistance, please email Lyn (Course Coordinator 1: Continuing Activities) at [coordinator1.u3a.bbay@gmail.com](mailto:coordinator1.u3a.bbay@gmail.com)

or Amanda (Course Coordinator 2: Venues) at [coordinator2.u3a.bbay@gmail.com](mailto:coordinator2.u3a.bbay@gmail.com)

For general enquiries you can call Joe on the U3A phone at 0474 483 678.

## 1. Tutor login

Locate the yellow 'Login' in the top right-hand corner of the website Home page [u3abatemensbay.org.au](http://u3abatemensbay.org.au) and click on the drop-down menu symbol ▼ When the menu displays click **Tutor Login** (Figure 1a). Use your member number (or email address) and your U-MAS password to log in. You do not have a separate password to log in as a Tutor, it's the same password as for Member login.

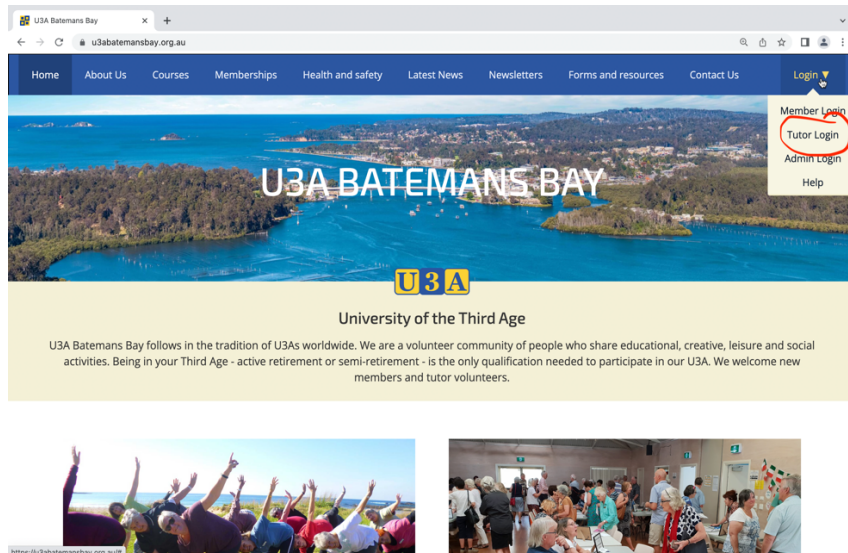


Figure 1a

This will display a Welcome screen (Figure 1b). You are now in the administrator part of U-MAS which allows you to manage course details and enrolments.

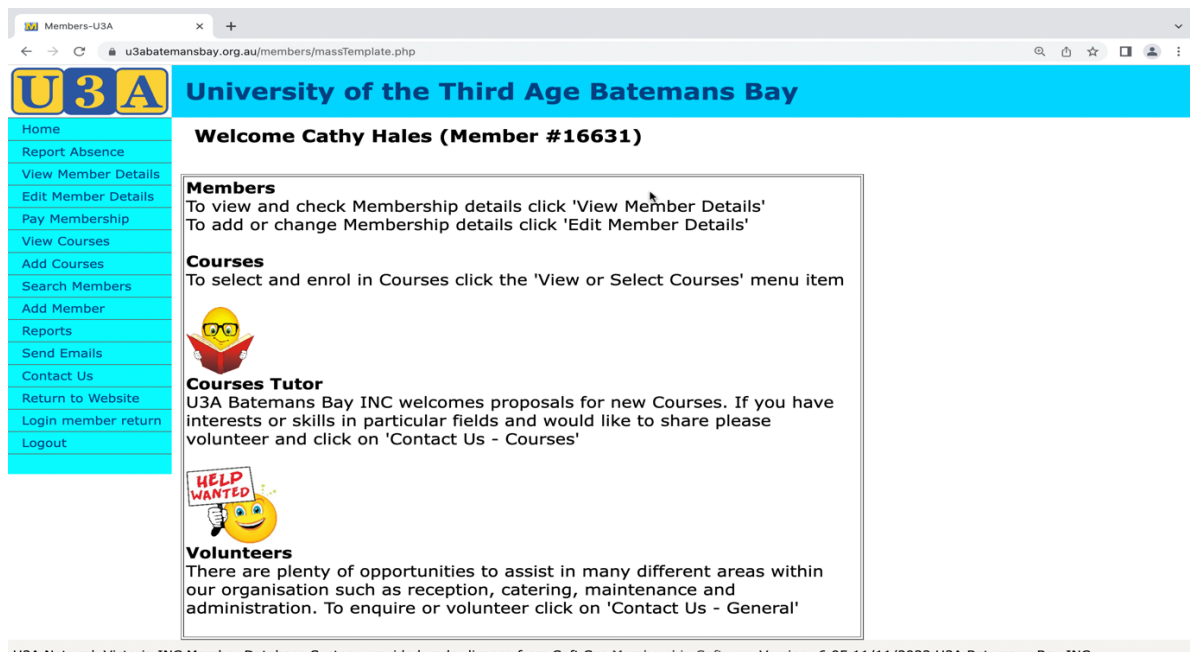
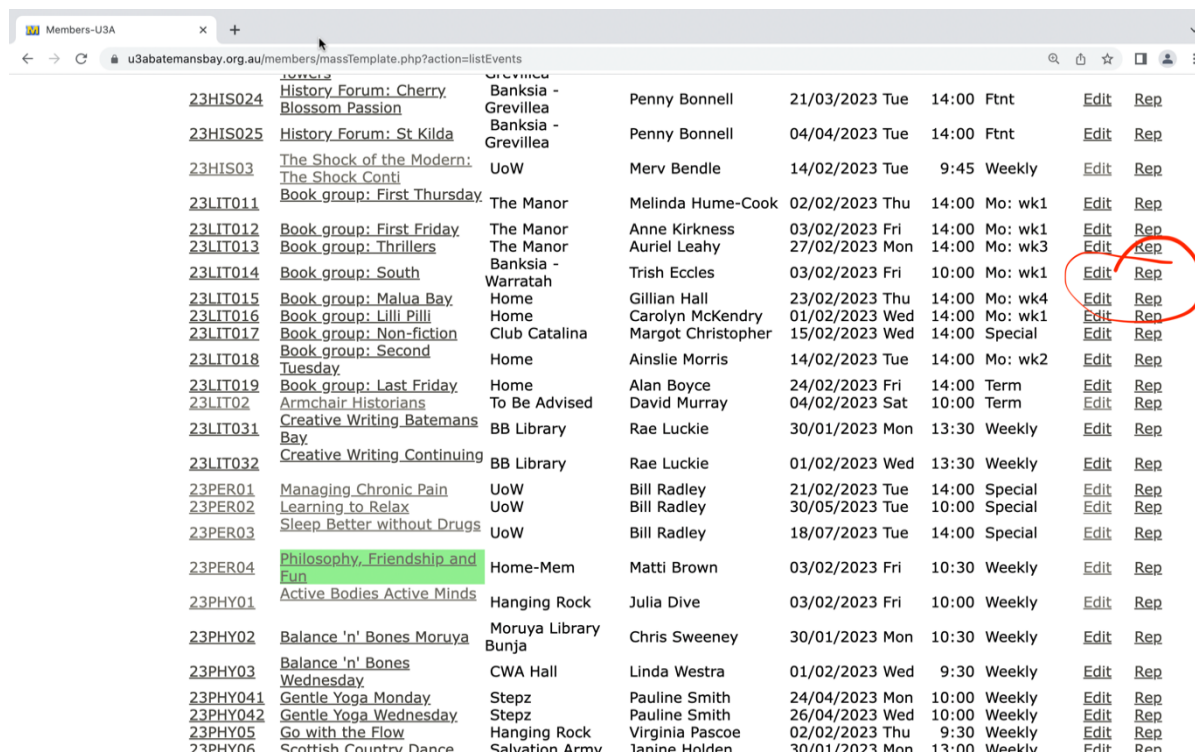


Figure 1b

## 2. View and edit your course

On the left-hand side of the Welcome screen is an aqua-coloured menu (see Figure 2a). This menu appears on most screens in the system and it is how we will move around to perform various tasks.

The sixth entry down is **View Courses**. Click on this and when the course list is displayed, locate the course you are teaching or assisting. At the end of the row you will see **Edit** and **Rep** (Figure 2a). These are links that allow you to, respectively, edit course details and generate an enrolments report.



Course ID	Course Name	Venue	Tutor	Start Date	Day	Time	Frequency	Edit	Rep
23HIS024	History Forum: Cherry Blossom Passion	Banksia - Grevillea	Penny Bonnell	21/03/2023	Tue	14:00	Ftnt	Edit	Rep
23HIS025	History Forum: St Kilda	Banksia - Grevillea	Penny Bonnell	04/04/2023	Tue	14:00	Ftnt	Edit	Rep
23HIS03	The Shock of the Modern: The Shock Conti	UoW	Merv Bendle	14/02/2023	Tue	9:45	Weekly	Edit	Rep
23LIT011	Book group: First Thursday	The Manor	Melinda Hume-Cook	02/02/2023	Thu	14:00	Mo: wk1	Edit	Rep
23LIT012	Book group: First Friday	The Manor	Anne Kirkness	03/02/2023	Fri	14:00	Mo: wk1	Edit	Rep
23LIT013	Book group: Thrillers	The Manor	Auriel Leahy	27/02/2023	Mon	14:00	Mo: wk3	Edit	Rep
23LIT014	Book group: South	Banksia - Warratah	Trish Eccles	03/02/2023	Fri	10:00	Mo: wk1	Edit	Rep
23LIT015	Book group: Malua Bay	Home	Gillian Hall	23/02/2023	Thu	14:00	Mo: wk4	Edit	Rep
23LIT016	Book group: Lilli Pilli	Home	Carolyn McKendry	01/02/2023	Wed	14:00	Mo: wk1	Edit	Rep
23LIT017	Book group: Non-fiction	Club Catalina	Margot Christopher	15/02/2023	Wed	14:00	Special	Edit	Rep
23LIT018	Book group: Second Tuesday	Home	Ainslie Morris	14/02/2023	Tue	14:00	Mo: wk2	Edit	Rep
23LIT019	Book group: Last Friday	Home	Alan Boyce	24/02/2023	Fri	14:00	Term	Edit	Rep
23LIT02	Armchair Historians	To Be Advised	David Murray	04/02/2023	Sat	10:00	Term	Edit	Rep
23LIT031	Creative Writing Batemans Bay	BB Library	Rae Luckie	30/01/2023	Mon	13:30	Weekly	Edit	Rep
23LIT032	Creative Writing Continuing	BB Library	Rae Luckie	01/02/2023	Wed	13:30	Weekly	Edit	Rep
23PER01	Managing Chronic Pain	UoW	Bill Radley	21/02/2023	Tue	14:00	Special	Edit	Rep
23PER02	Learning to Relax	UoW	Bill Radley	30/05/2023	Tue	10:00	Special	Edit	Rep
23PER03	Sleep Better without Drugs	UoW	Bill Radley	18/07/2023	Tue	14:00	Special	Edit	Rep
23PER04	Philosophy, Friendship and Fun	Home-Mem	Matti Brown	03/02/2023	Fri	10:30	Weekly	Edit	Rep
23PHY01	Active Bodies Active Minds	Hanging Rock	Julia Dive	03/02/2023	Fri	10:00	Weekly	Edit	Rep
23PHY02	Balance 'n' Bones Moruya	Moruya Library Bunja	Chris Sweeney	30/01/2023	Mon	10:30	Weekly	Edit	Rep
23PHY03	Balance 'n' Bones Wednesday	CWA Hall	Linda Westra	01/02/2023	Wed	9:30	Weekly	Edit	Rep
23PHY041	Gentle Yoga Monday	Stepz	Pauline Smith	24/04/2023	Mon	10:00	Weekly	Edit	Rep
23PHY042	Gentle Yoga Wednesday	Stepz	Pauline Smith	26/04/2023	Wed	10:00	Weekly	Edit	Rep
23PHY05	Go with the Flow	Hanging Rock	Virginia Pascoe	02/02/2023	Thu	9:30	Weekly	Edit	Rep
23PHY06	Scottish Country Dance	Salvation Army	Tanina Holden	30/01/2023	Mon	13:00	Weekly	Edit	Rep

Figure 2a

Click the **Edit** link. This will open the **Edit Course** screen. You can edit some of the fields, including the **Comments** field which contains the course description. Please take a few minutes to check your course details and update the description, if necessary, by typing into the field.

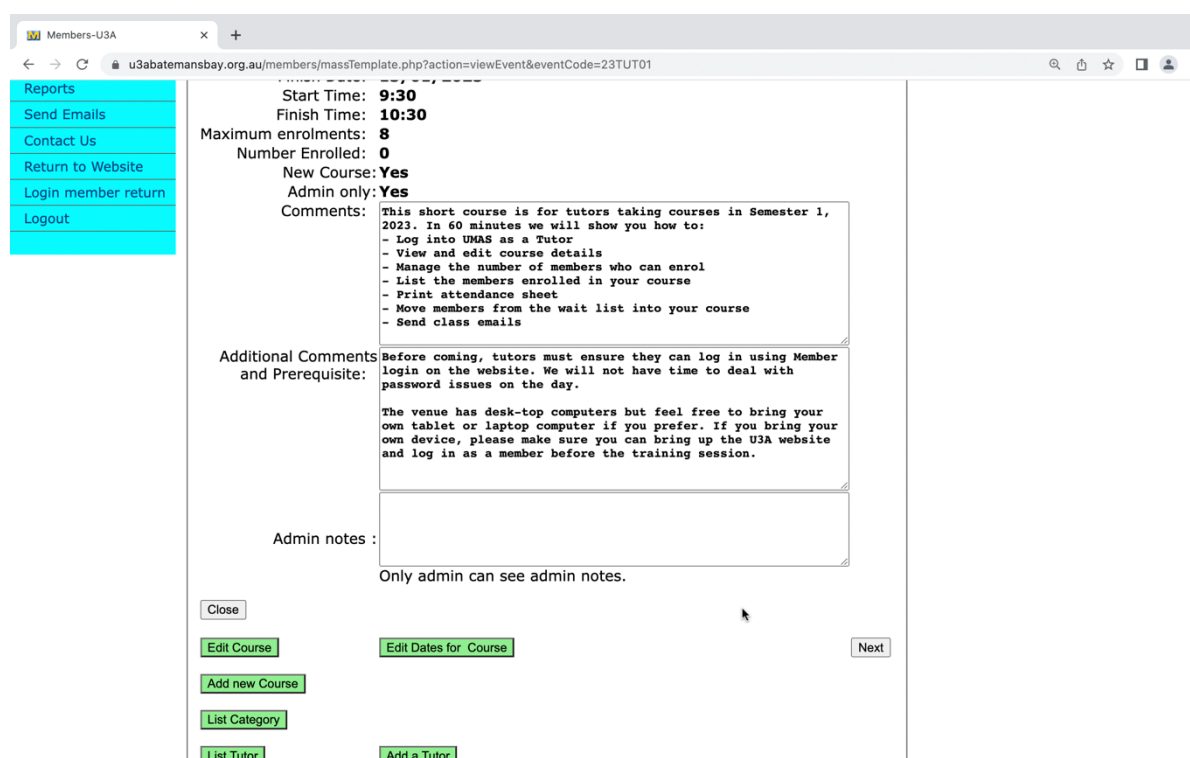
- Only course coordinators can change the venue, start and finish times. Any changes to venues and dates need to go through Amanda and/or Lyn.
- Tutors cannot edit the **Fee** field; this field must show '0.0' (zero). If course participants are to pay an amount for materials or photocopying, for example, then note this in the **Comments** field.
- Check the number shown against **Maximum enrolments**. This should match the number that you advised course coordinators, or it might be venue dependent. Is it set correctly for your course? See Section 6 for instructions on using **Maximum enrolments** to restrict enrolments to those approved by the tutor.

## Wait listing (see also Section 6)

If you are going to initially wait-list all enrolments then it is good practice to make a note of this in the **Comments** field so that members know why the course has zero places at the start of the enrolment period.

When finished editing, press **Save** at the bottom of the screen or **Close** if details are unchanged.

You should now see the **Course Details** screen; scroll to the bottom where you will see a number of green buttons (example in Figure 2b).



The screenshot shows a web browser window with the URL `u3abatemansbay.org.au/members/massTemplate.php?action=viewEvent&eventCode=23TUT01`. On the left is a navigation menu with links like Reports, Send Emails, Contact Us, Return to Website, Login member return, and Logout. The main content area displays course details: Start Time: 9:30, Finish Time: 10:30, Maximum enrolments: 8, Number Enrolled: 0, New Course: Yes, Admin only: Yes. The Comments field contains a list of tasks for tutors. Below that is the Additional Comments and Prerequisite field, and then the Admin notes field. At the bottom, there are several green buttons: Close, Edit Course, Edit Dates for Course, Add new Course, List Category, List Tutor, and Next.

Figure 2b

The **Edit Course** button takes you back to the Edit Course screen (where we have just been).

Click on **Edit Dates for Course** button to displays all the dates that your course will run. Only Course Coordinators can add or remove dates for a course but please check that your course has been set up correctly and advise Lyn or Amanda if you require any date changes.

When you have finished checking the course details and dates, press **Close** to return to the full course list.

**NB:** Do not tick the box beside 'Is this course closed?'. Ticking this box will display on the website as a closed course to enrolments, so people cannot enter themselves on the

waitlist. It is only meant to be ticked when the course is completed (eg at the end of the semester or year).

### 3. List course enrolments

With the full course list displayed, locate the **Rep** link, next to **Edit** at the end of the row containing your course entry. **Rep** is the easiest way to generate a standard enrolments report. As the system is not yet open to enrolments, the enrolments report for your course will be empty, but press **Rep** and see what happens.

Another way to generate an enrolments report and have more control over the information included, such as emergency contact details, is to use **Reports**. See Figure 3 and follow these steps:

1. Click the **Reports** link in the left side menu.
2. On the reports screen, choose the **Enrolments** tab. The report you need is generated from the green button labelled **List enrolments** at the top of the screen.
3. Configure the report:
  - a. Find your course in the **Choose a Course** dropdown.
  - b. To include class participants who are currently on the wait list, tick 'Include wait listed'.
  - c. To include participants' addresses, tick 'Show address'.
  - d. To include emergency contact details, tick 'Show Emergency contact'.
  - e. Choose a **Sort order**. This gives you control over the order of participants on the list, for example, by member number, or by surname then first name, or by status (enrolled/waitlisted) then date of enrolment, etc.
4. Click the **List enrolments** button to generate the enrolments list (see sample beneath Figure 3).
5. If required, click the Print button to print the report.



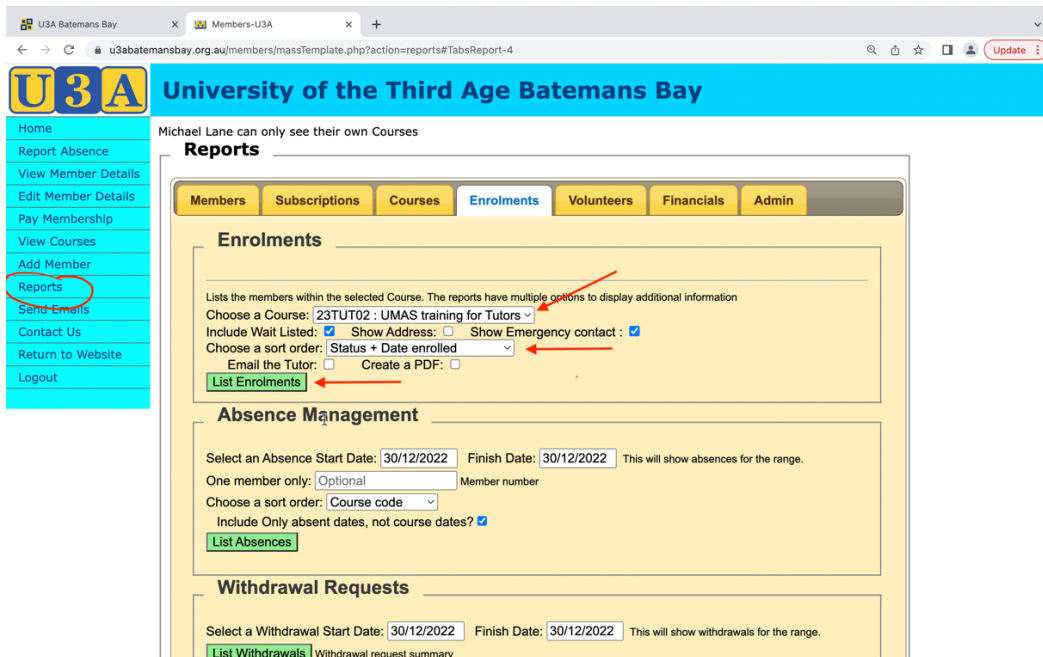


Figure 3

## Sample Enrolment list

### Enrolment List

Print

Course: **HISTRY19** History of Healesville

Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**

Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile	Phone	Email
17/12/2018		1377	Annie Jones		( ) -	info@barbendir
Emergency contact:	Fred Jones	Contact number:	0400 000 000	Relationship:		
17/12/2018		1003	Lizzy Member	0415 333 444	(03) 5962-9999	liz.member@gp
Emergency contact:	Fred Test	Contact number:	0359629999	Relationship:	Husband	
17/12/2018		1004	Lou Member	0400 123 456		lou.member@g
Emergency contact:	Alice	Contact number:	0444 444 444	Relationship:	Spouse	

Total number of records is 3

Maximum number is 25, Enrolled is 3, Available is 22

Close and return to Reports

Close and return to Courses

#### 4. Generate a course attendance list with dates

Semester has begun and you are about to take the first class – you’ll need an attendance, or sign-on, sheet.

1. Click the **Reports** link in the left side menu.
2. On the reports screen, choose the **Enrolments** tab and scroll down to the **Attendance** section at the bottom of screen (Figure 4).
3. Configure the report:
  - a. Go to the **Choose a Course** dropdown and find your course.
  - b. Enter the required date range: Usually this would be the dates covered by the current semester or term. A full year is not recommended as it produces so many columns that it can be unreadable. If you want larger columns then enter the date range for the current term only, e.g. 30/1/2024 to 6/4/2024, or just the next month, if desired.
  - c. Choose a sort order, e.g. First Name or Surname. This is the order in which participants will appear on the list.
  - d. To include class participants who are currently on the wait list tick 'Include Wait Listed', otherwise leave this unticked.
  - e. To include extra blank rows on the list (i.e. in case of more enrolments) enter the number of extra rows in the 'Extra horizontal lines' on list field.
  - f. You can tick/untick 'Match up columns with dates' to adjust the format of the report.
  - g. To create a PDF report, tick 'Create a PDF'.
  - h. To email the list to the course leader, tick 'Email the leader'. On doing this, the 'Create a PDF' checkbox will be auto-selected, so that the list will be emailed as a PDF attachment.
  - i. Click the **Attendance list** button to generate (and email, if ticked) the list. The attendance list will open in a pop-up window. See sample list beneath Figure 4.
  - j. If required, click the **Print** button to print the list.

The screenshot shows a web browser window with the URL `u3abatemensbay.org.au/members/masTemplate.php?action=reports#TabsReport-4`. The page is titled "Withdrawal Requests" and contains two main sections:

- Withdrawal Requests:** This section has two identical forms. Each form includes input fields for "Withdrawal Start Date" and "Finish Date" (both set to 19/12/2022). Below each form is a green button labeled "List Withdrawals" and "Download Withdrawal CSV file".
- Attendance:** This section is circled in red. It contains a form for generating attendance lists. It includes:
  - Input fields for "Select Course Dates between" (dd/mm/yyyy) and "and" (dd/mm/yyyy).
  - Checkboxes for "Include Wait Listed" and "Match up columns with dates".
  - A dropdown menu for "Choose a sort order" (set to "Please Select").
  - An input field for "Extra horizontal lines on list" (set to 0).
  - A green button labeled "Print all Course Attendance Lists".

Below the Attendance form, there is another form for a specific course:
 

- "Choose a Course" dropdown: 23PHY01 : Active Bodies Active Minds.
- "Select Course Dates between" (30/01/2023) and "and" (06/04/2023) with a note "will appear on the list".
- Checkboxes for "Email the Tutor" and "Create a PDF" (checked).
- Dropdown for "Choose a sort order" (set to "Surname (first, surname)").
- Input field for "Extra horizontal lines on list" (set to 3).
- Input field for "Match up columns with dates" (unchecked).
- A green button labeled "Attendance list".

 Handwritten red letters 'a', 'b', and 'c' are visible near the course selection and date fields. A red arrow points to the "Attendance list" button.

U3A Network Victoria IMC Member Database System provided under license from Soft Sys Membership Software Version: 6.05 11/11/2022 U3A Batemans Bay IMC

Figure 4

## Sample Attendance list

### Attendance Class List

Course: **HISTORY19 History of Healesville** Print  
 Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**  
 Venue and zTutor: **The Court House - Sally Tutor**

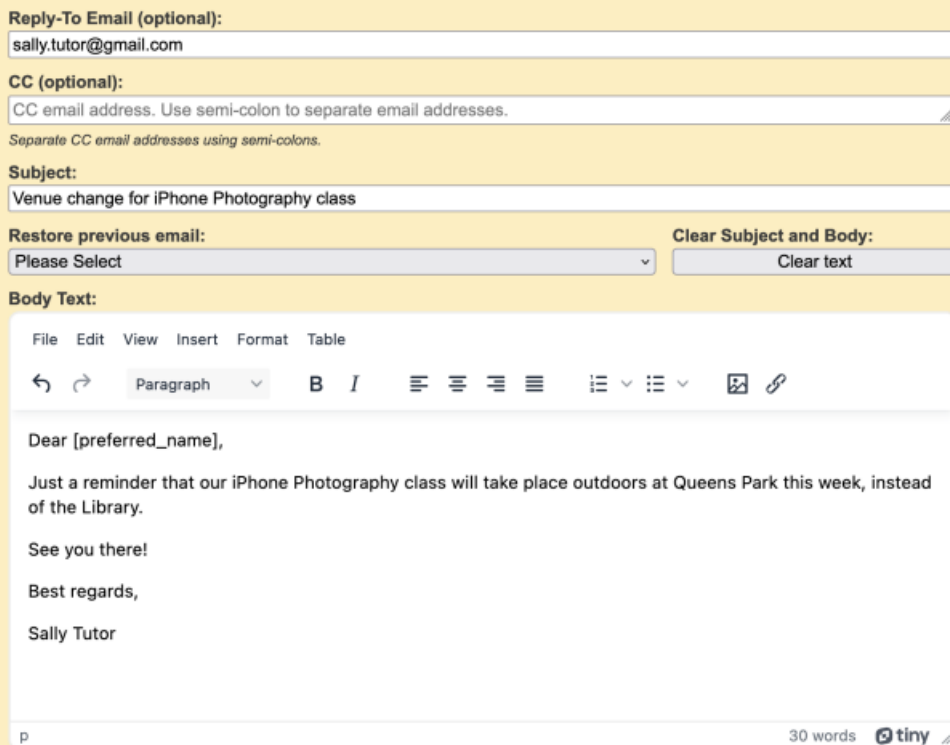
Name	07/10	14/10	21/10	28/10	04/11	11/11
Lizzy Member						
Lou Member						

## 5. Email your course participants

You can email participants in courses that you tutor. Tutors can't email participants in courses run by other tutors. The main advantage of using UMAS to email course participants is that you don't need to manage email address lists, just choose the course/class and the system will send to all the members in that course/class. You can also email individual participants, though there is little advantage doing this from UMAS compared to simply emailing from your own email address – it requires more steps to do this from UMAS but you might find it a convenient way to access a member's email address and not have to type it in.

To send a class email:

1. Click the **Send Emails** link in the left side menu.
2. On the **Send Emails** screen, choose the **Enrolments** tab.
3. Configure the email (example in Figure 5):
  - a. In the **Reply-to Email (optional)** text field, enter your own email address to ensure that when recipients reply to your email their reply is sent to you (otherwise, their reply will go to the UMAS administrator email info@u3abatemansbay.org.au).
  - b. Add a CC address(es) if required, in the second field.
  - c. Fill in the Subject field.
  - d. Fill in the email body. If you want to attach a document to the email, use the **Insert** button to select a file on your computer. Please limit this to single PDF documents that are not too large. To send multiple or large files please send from your own email address, do not use the UMAS emailer.



The screenshot shows the 'Send Emails' form in UMAS. It has a yellow background and contains the following sections:

- Reply-To Email (optional):** A text input field containing 'sally.tutor@gmail.com'.
- CC (optional):** A text input field with the placeholder 'CC email address. Use semi-colon to separate email addresses.' and a small icon on the right. Below it, a note says 'Separate CC email addresses using semi-colons.'
- Subject:** A text input field containing 'Venue change for iPhone Photography class'.
- Restore previous email:** A dropdown menu with 'Please Select' as the current selection.
- Clear Subject and Body:** A button labeled 'Clear text'.
- Body Text:** A rich text editor with a menu bar (File, Edit, View, Insert, Format, Table) and a toolbar with icons for undo, redo, paragraph, bold, italic, bulleted list, numbered list, link, and unlink. The body text contains:  
Dear [preferred\_name],  
Just a reminder that our iPhone Photography class will take place outdoors at Queens Park this week, instead of the Library.  
See you there!  
Best regards,  
Sally Tutor
- At the bottom right, it shows '30 words' and the 'tiny' logo.

Figure 5a

- e. If you want to use an email that you have previously sent as a base you can select from the emails available in the 'Restore previous email' dropdown. This will fill the reply to, subject, and email body fields with the content from the selected previous email.

- f. **Choose a Course:** Choose the class that you want to email, you can choose any course that you lead.
- g. By default, the email will not be sent to members who are wait-listed for the selected course. You can include wait-listed members by ticking the box for 'Include Wait Listed'. Or if you just want to email members on the waitlist, tick 'Send only to Wait Listed'.
- h. If you want to send a copy of the email to yourself (and your assistant if applicable) tick '**Email the tutor**'.

Figure 5b

- i. Click **Send Enrolment Emails**. If the email is acceptable for sending, you'll see a confirmation message: Click Yes to confirm and send the email. If the email is not acceptable for sending, an explanatory message will be displayed, and you'll need to start again from step 2.

**Note:** If you want to email an individual participant then, below the email settings, you can choose which members to send to. There is a button for sending to a range of member numbers. Enter the member number for the member you wish to email as both the start and end of the range and then click the appropriate Send Emails button (e.g. "Send Active Member Emails"). It might be easier to email individual course participants from your own email account, not from UMAS. The UMAS emailer is really designed for emailing multiple members in one go, especially for sending class emails.

6. You'll see a confirmation message: Check that the details are as expected, including the number of emails to be sent and the information regarding any attachments. If everything looks ok, click **Yes** to confirm and send the email (you can choose to display sending progress either in the same browser tab or a separate one).

7. The Bulk Email Progress page will be displayed, showing the sending progress. Wait until the progress bar reaches 100%, showing that all emails have been sent: Do not close the tab/browser window before sending has finished, as this will stop the sending process. Generally, sending will be quite quick, but may be slower if you have included an attachment, if you have a large class, or if your U-MAS admin has configured the system to send slowly.

### Bulk Email Progress

Date/Time	Subject	Sent By	Member No.	Member Email	Batch No.	# In Batch	Sent	Sent Status	Message ID
2023-09-29 16:25:59	Venue change for iPhone Photography class	1001	2005	Sebastian.Oliver@barbendingdesigns.com	237	7	✓	Yes	6819
2023-09-29 16:25:59	Venue change for iPhone Photography class	1001	2001	Raquel.Simpson@barbendingdesigns.com	237	6	✓	Yes	6818

Note: Members without a valid email address will need to be contacted by phone or SMS.

## 6. Manage a wait list

A wait list will be generated for a course if enrolments exceed the **Maximum enrolments** value set for the course. You can change the value for **Maximum enrolments** on the **Edit Course** screen (see Section 2). Course coordinators have set up your course with a value for **Maximum enrolments** as advised by you, or perhaps according to venue capacity.

### Restricting enrolments to require tutor approval

If you wish to automatically wait-list all enrolments as they occur and accept each member into the course individually, you will need to set **Maximum enrolments** to **zero** before early enrolment day.

For example, a tutor may wish to check that members who enrol in a course have completed a prerequisite, or there may be some other reason to place members on a wait-list so that the tutor approves the enrolment, rather than have members enrol and then have to withdraw because the course is unsuitable for them. If you are starting off with zero **Maximum enrolments** please include a note in the course description (Edit Course...Comments) to let members know that when they enrol they will be placed on a waiting list until the tutor accepts them into the course. The member will be able to see their enrolment status when logged into UMAS for Members.

Follow the steps below to accept wait-listed members into your course, noting that if the course is already full you will first need to increase **Maximum enrolments**.

1. Find the course in the course list view ([View Courses](#) on left side menu).
2. Click the **Rep** link for the course (last column on view course screen).
3. Click the **Wait** link in the wait-listed member's row (**Wait** will only appear if one or more members are wait-listed for your course).

## Sample Enrolment list with wait-list indicator

### Enrolment List

Course: [HISTRY19](#) History of Healesville

Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**

Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile	
17/12/2018		<a href="#">1004</a>	Lou Member	0400 123 456	<a href="#">Delete</a>
17/12/2018		<a href="#">1003</a>	Lizzy Member	0415 333 444	<a href="#">Delete</a>
04/02/2019	09:00:09 AM	<a href="#">1379</a>	Dewi Sulianti		<a href="#">Wait</a> <a href="#">Delete</a>
04/02/2019	09:37:33 AM	<a href="#">1380</a>	Alf Ricci		<a href="#">Wait</a> <a href="#">Delete</a>

Total number of records is 4

Maximum number is 3, Enrolled is 2, Available is 1

To enrol a wait listed enrolment click on the 'wait' link.

## 7: Remove a member from a course

1. Find the course in the course list view ([View Courses](#) on left side menu).
2. Click the **Rep** link for the course (last column).
3. Click the **Delete** link in the member's row.

### Sample Enrolment list with Delete indicator

#### Enrolment List

Course: **HISTORY19 History of Healesville**

Dates: **07/10/2019 - 13/12/2019** Time: **14.00 - 15.00** Day: **Mon**

Venue and Leader: **The Court House - Sally Tutor**

Enroll Date	Time	Member#	Name	Mobile	
17/12/2018		1004	Lou Member	0400 123 456	<a href="#">Delete</a>
17/12/2018		1003	Lizzy Member	0415 333 444	<a href="#">Delete</a>
04/02/2019	09:00:09 AM	1379	Dewi Sulianti		<a href="#">Wait</a> <a href="#">Delete</a>
04/02/2019	09:37:33 AM	1380	Alf Ricci		<a href="#">Wait</a> <a href="#">Delete</a>

Total number of records is 4

Maximum number is 3, Enrolled is 2, Available is 1

To enrol a wait listed enrolment click on the 'wait' link.

When a member is removed from a course:

- the member and tutor will normally receive an email notification
- the course will be displayed in red text in the member's enrolments list.

**Heads up:** if you are wait-listing all enrolments and a member is removed, check a vacancy is not made available for another member to enrol and bypass the wait list.

## 8: Check on absences

A member can let their tutor know they will miss one or more classes by entering the absence dates into UMAS for Members. UMAS will then notify the tutor by email and the tutor will then note this on the printed attendance sheet.

It is possible to print a report of all absences recorded by your class participants. This is done from the same **Reports** menu used to print Enrolment and Attendance Lists. The Absence Management section of the menu is two above Attendance (Figure 8). See steps for generating an Absence report, below.

Old habits die hard and many members will probably continue to telephone or email their absences direct to tutors until the Absence feature of UMAS becomes widely known.

The screenshot shows a web browser window with the URL `u3abatemensbay.org.au/members/massTemplate.php?action=reports#TabsReport-4`. The page content is divided into several sections:

- Absence Management** (highlighted with a red circle):
  - Include Wait Listed:  Uncheck to exclude from count. eg. wait-listed is a zero enrolment.
  - Number of enrolments:  Default is 0 for zero enrolments.
  - Select a Member active status:  Active  Inactive  All
  - [List Zero Enrolments](#) Searches members and their actual enrolments from the date above.
  - Select an Absence Start Date:  Finish Date:  This will show absences for the range.
  - One member only:  Member number
  - Choose a sort order:
  - Include Only absent dates, not course dates?
  - [List Absences](#)
- Withdrawal Requests**:
  - Select a Withdrawal Start Date:  Finish Date:  This will show withdrawals for the range.
  - [List Withdrawals](#) Withdrawal request summary
  - Select a Withdrawal Start Date:  Finish Date:  This will create a CSV file.
  - [Download Withdrawal CSV file](#) Withdrawal request detail
- Attendance**:
  - Select Course Dates between:  and:
  - Include Wait Listed:
  - Choose a sort order:
  - Extra horizontal lines on list:
  - Match up columns with dates:
  - [Print all Course Attendance Lists](#)

Figure 8

1. Click the **Reports** link in the left side menu.
2. On the reports screen, choose the **Enrolments** tab and scroll down to the **Absence Management** section (Figure 8).
3. Configure the report:
  - a. In the 'Select an Absence Start/Finish Date' enter a date range for which you want to check for any recorded absences. In the example in Figure 8 we entered the dates for Term 1, 2023.
  - b. If you want to check absences for just one participant, enter their member number in the 'One member only' field. If you want to check on all absences, leave this blank ('Optional').
  - c. **Choose a sort order**, for example, Start date.



- d. Click the **List Absences** button to generate the report. The Absence report will open in a pop-up window.

## **UMAS Help Desk**

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