SWISH - How to Guide for Group Leaders

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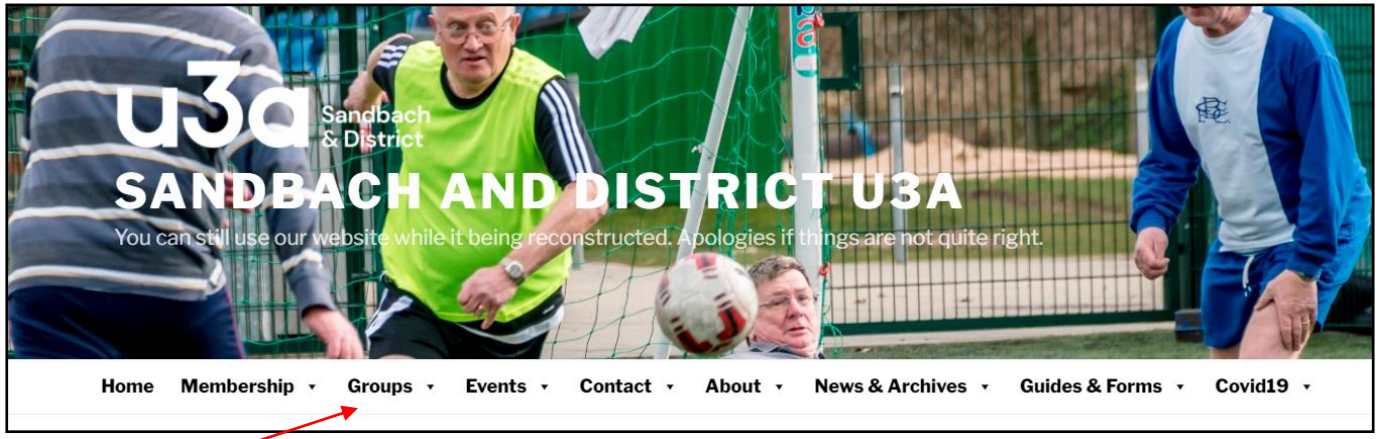
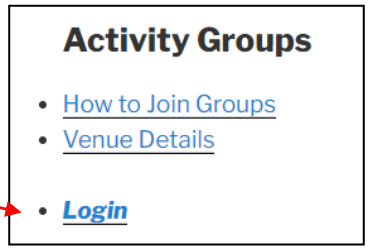
*Please Note: For Group Finances where members may wish to pay online there is a separate guide available, “Group Finance Online Reporting Guide” which is to be read in conjunction with this guide

Introduction

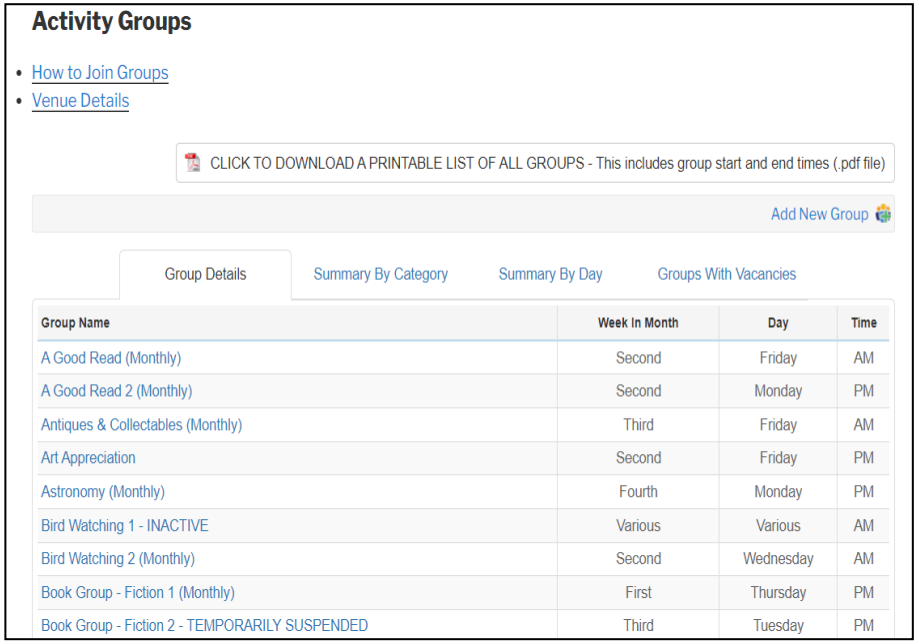


Go to the Sandbach U3A homepage **http://sandbachu3a.org.uk** and click on the Groups tab



Under the Activity Groups heading click **Login,** to log in with your username and password

Once you have logged in you will be returned to the Activity Groups page, this is arranged in alphabetical order. From the list scroll down and click on your group



Group Name	Week In Month	Day	Time
A Good Read (Monthly)	Second	Friday	AM
A Good Read 2 (Monthly)	Second	Monday	PM
Antiques & Collectables (Monthly)	Third	Friday	AM
Art Appreciation	Second	Friday	PM
Astronomy (Monthly)	Fourth	Monday	PM
Bird Watching 1 - INACTIVE	Various	Various	AM
Bird Watching 2 (Monthly)	Second	Wednesday	AM
Book Group - Fiction 1 (Monthly)	First	Thursday	PM
Book Group - Fiction 2 - TEMPORARILY SUSPENDED	Third	Tuesday	PM

Group page - overview

The Group page gives the time, frequency, day and venue as well as a description of the activity.

It also shows the number of vacancies, whether the group is full or has a waiting list

The Group header contains a green left hand arrow which navigates you back to the alphabetical group page.

HIstory - Local HIstory

Time	-	Various
Week in Month	-	Fourth
Day	-	Thursday
Venue	-	Masonic Hall
Vacancies	-	29

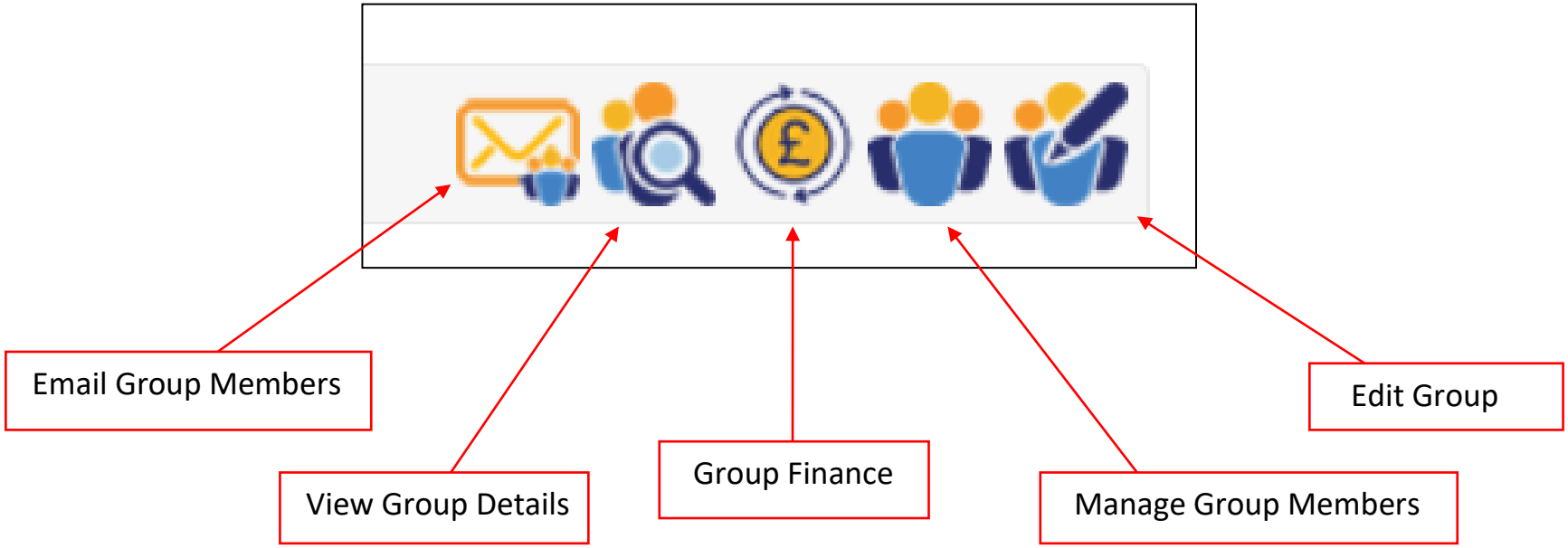
The aim of this group is to research the history of Sandbach and its surrounding area from Roman times to the present day.

At our regular meetings we will consider the sources of information best suited to support our research. We will also review the progress on the various projects that members are involved with and share some of the interesting discoveries that come to light.

It is expected that group members will have different desired levels of involvement, ranging from those who are curious but have little spare time to conduct research to those with bags of enthusiasm and local history. It is anticipated that members of the group will conduct their own rese working either alone, in pairs, or in small groups, and once a year will arrange for the appropriate to that chosen interest.

The icons on the right-hand side enable you to edit group details and manage groups members etc. These are only visible once you have logged in.

Group page – overview - ICONS



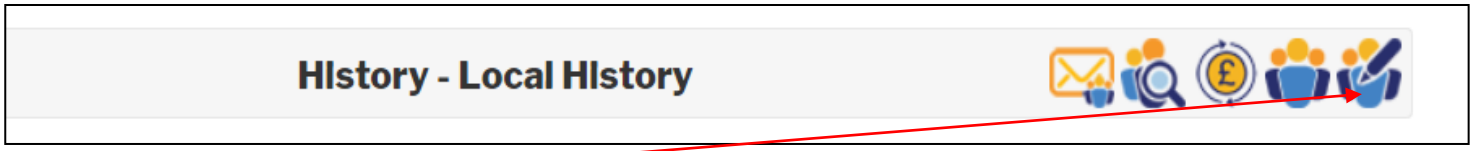
Before you start to add members to your group you will need to check that the information on your Group page is correct.

You will also need to add details of the size of your group and waiting list.

This can be done via “Edit Group”.

NB: If none of the above icons are visible on your group page please contact the membership secretary who will set up the appropriate access membership@sandbachu3a.org.uk

Edit Group



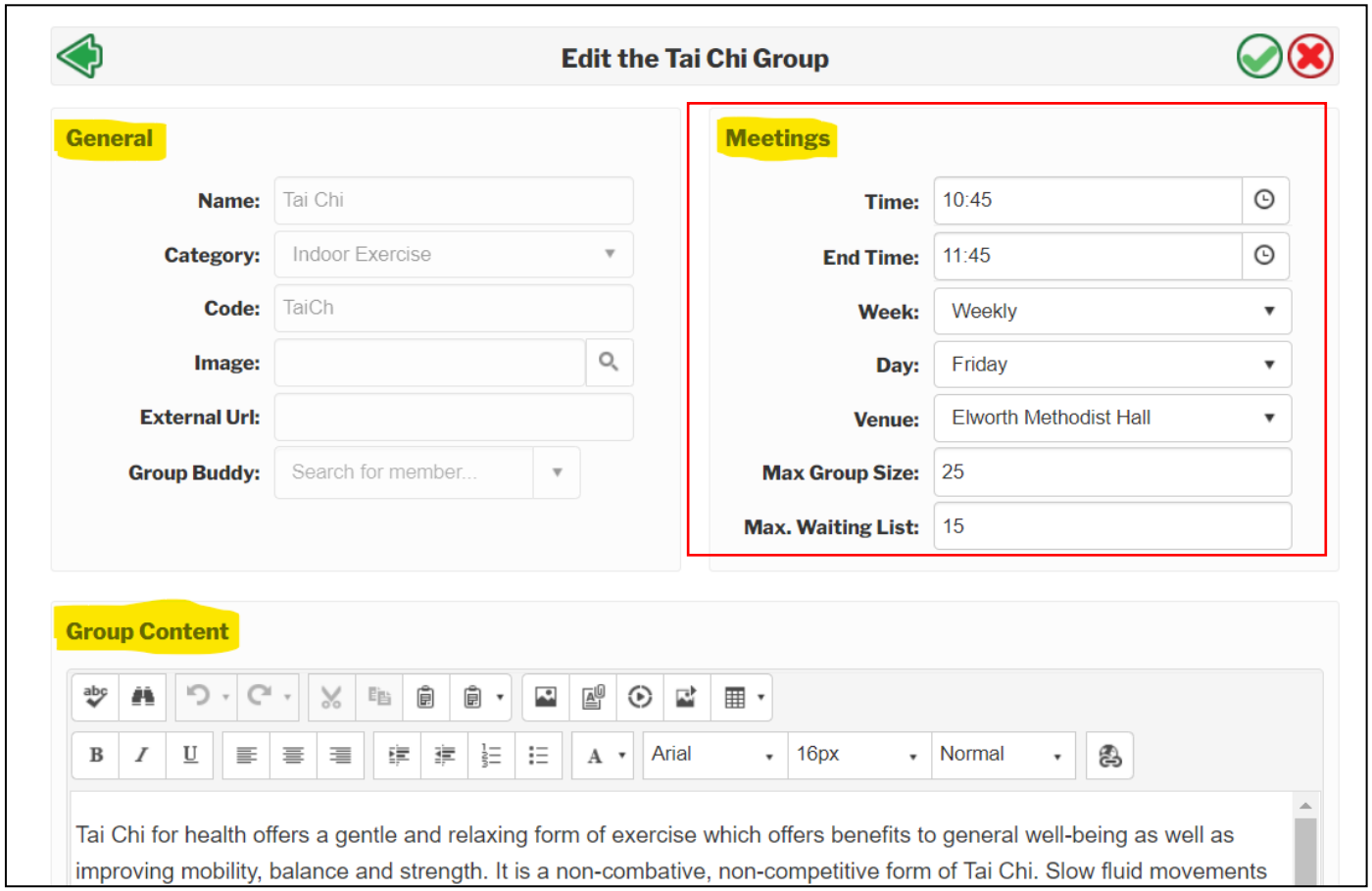
To edit the information that appears on the Group page click on the Edit Group icon

This page is divided into 3 sections:

General - This section gives the group name, category and image boxes. This section **cannot** be edited by group leaders, any changes would need to be undertaken by the Groups Coordinator, e-mail address: groups.co-ordinator@sandbachu3a.org.uk

Meetings – This section can be edited if required see page 6

Group Content – This can be edited or changed if incorrect, see page 10

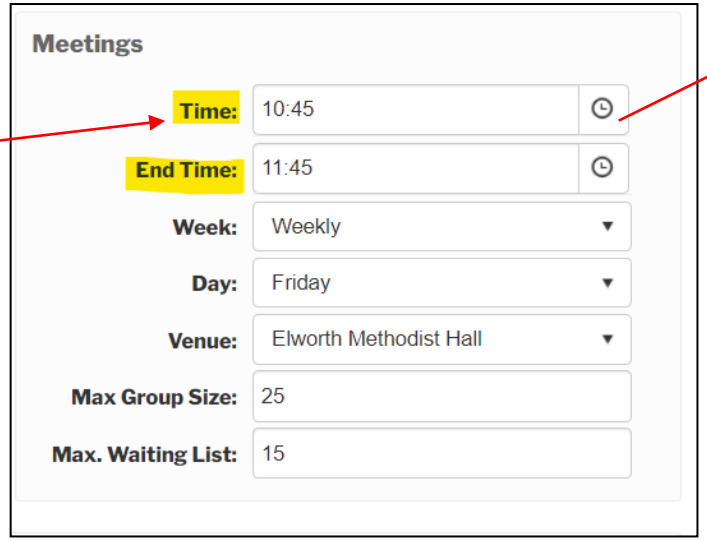


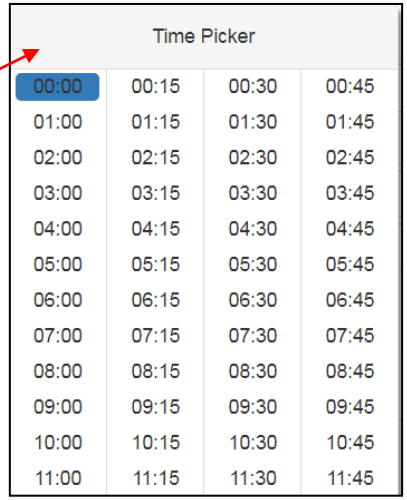
Edit Group con't

1. Time - To change the time either click on the time box and enter the correct start time, or click on the clock icon and choose the correct time from the list.

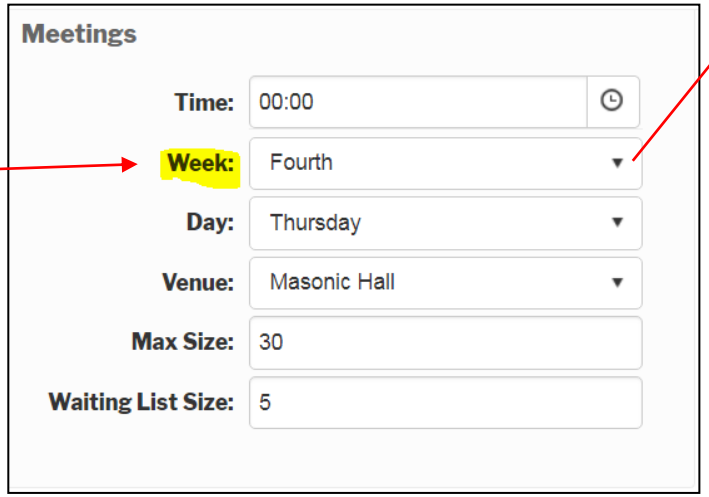
Select the correct end time

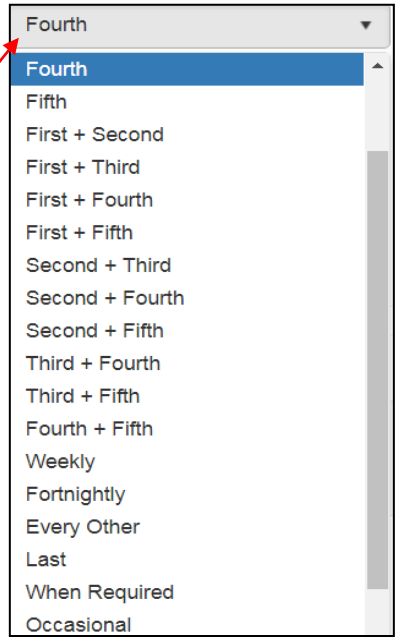
NB: Selecting the time 00:00 will insert the time as "Various" in the Group page





2. Week – To change the meeting regularity click on the box and select the appropriate description

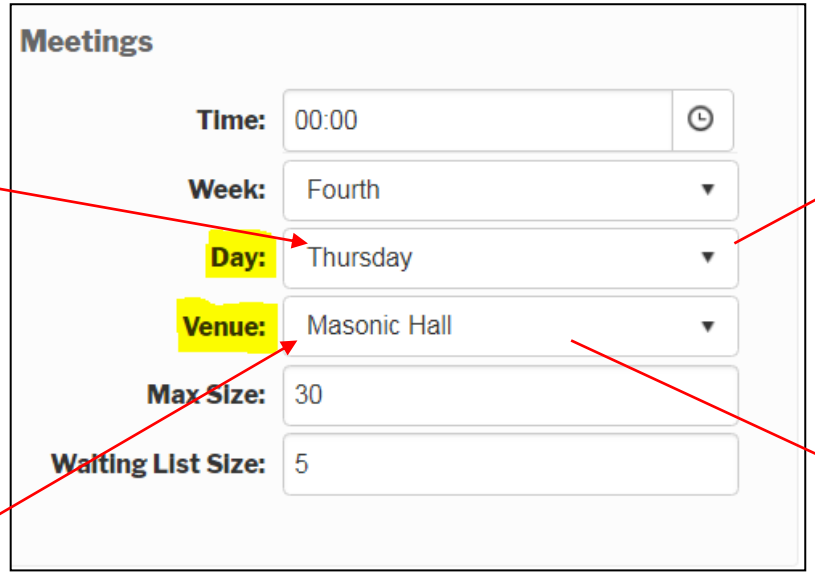


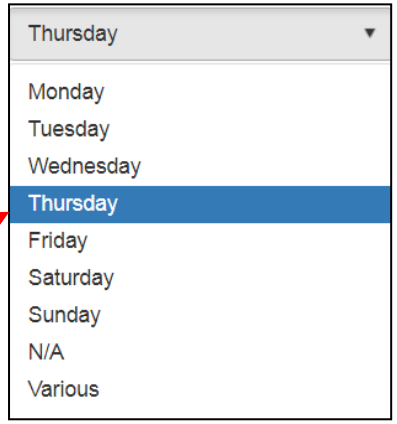


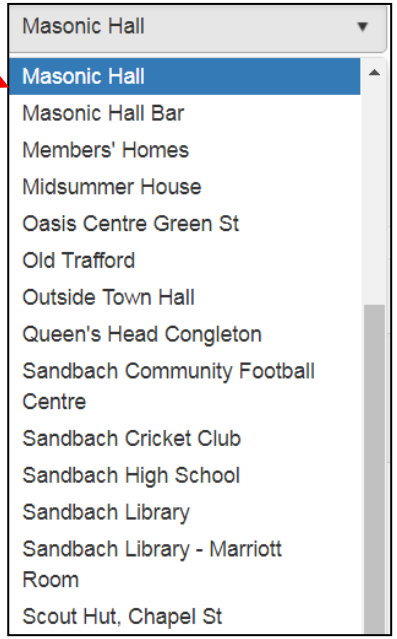
Edit Group con't

3. Day – Click on the box and choose the day of the week

4. Venue - Click on the box and scroll down the list to choose the appropriate one. If your venue is not listed please contact the Groups Coordinator e-mail address: groups.co-ordinator@sandbachu3a.org.uk







Edit Group con't

PLEASE NOTE: Group Size & Waiting List

The maximum size of your group is up to you. There are several factors to take account of, for example:

- The type of activity and degree of tuition required
- Size of the venue & availability of equipment or facilities
- Health and Safety
- A regular absentee level which allows more members to be signed than normally attend. Note: If your group uses PrePay arrangements, where members pay for several sessions in advance, you will probably experience more consistent attendances.

Please try and estimate the waiting list size so members have a chance of becoming a member of your group within a reasonable period.

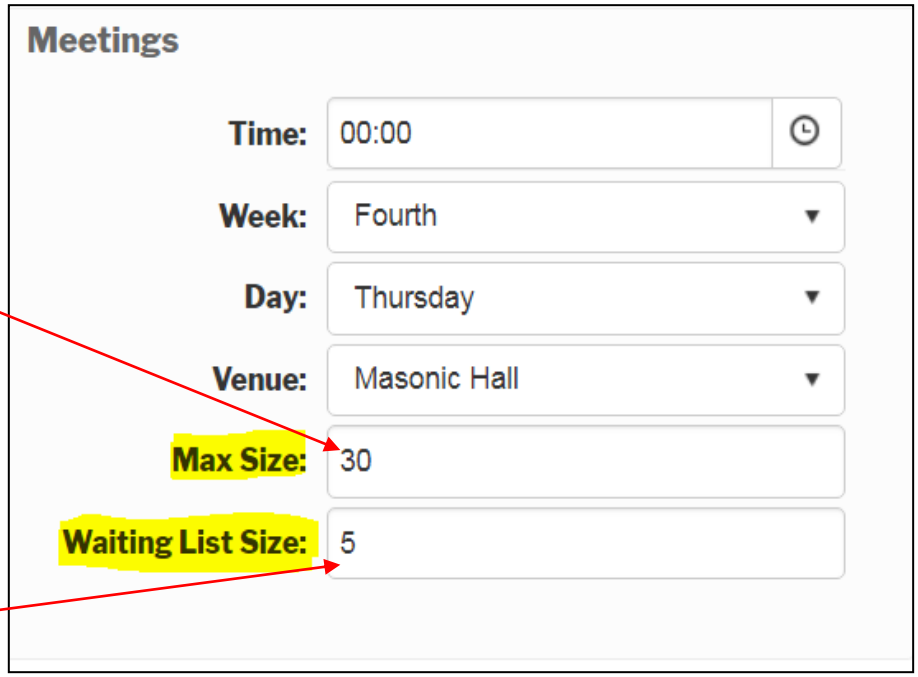
The Groups Coordinator groups.co-ordinator@sandbachu3a.org.uk will be pleased to help if you are unsure of the size settings to apply. You can change the settings at any time in "Edit Group", except that you cannot reduce the sizes below the number already in the group or waiting list respectively.

If your group has vacancies, the group page will display the number of vacancies. If the group is full, the display will show "Waiting List" if there are waiting list places available or otherwise "Completely Full".

Edit Group con't

5. Max size – Click on the box and type in the maximum number of people in your group.

6. Waiting list size – Click on the box and type in maximum number of people for your waiting list.

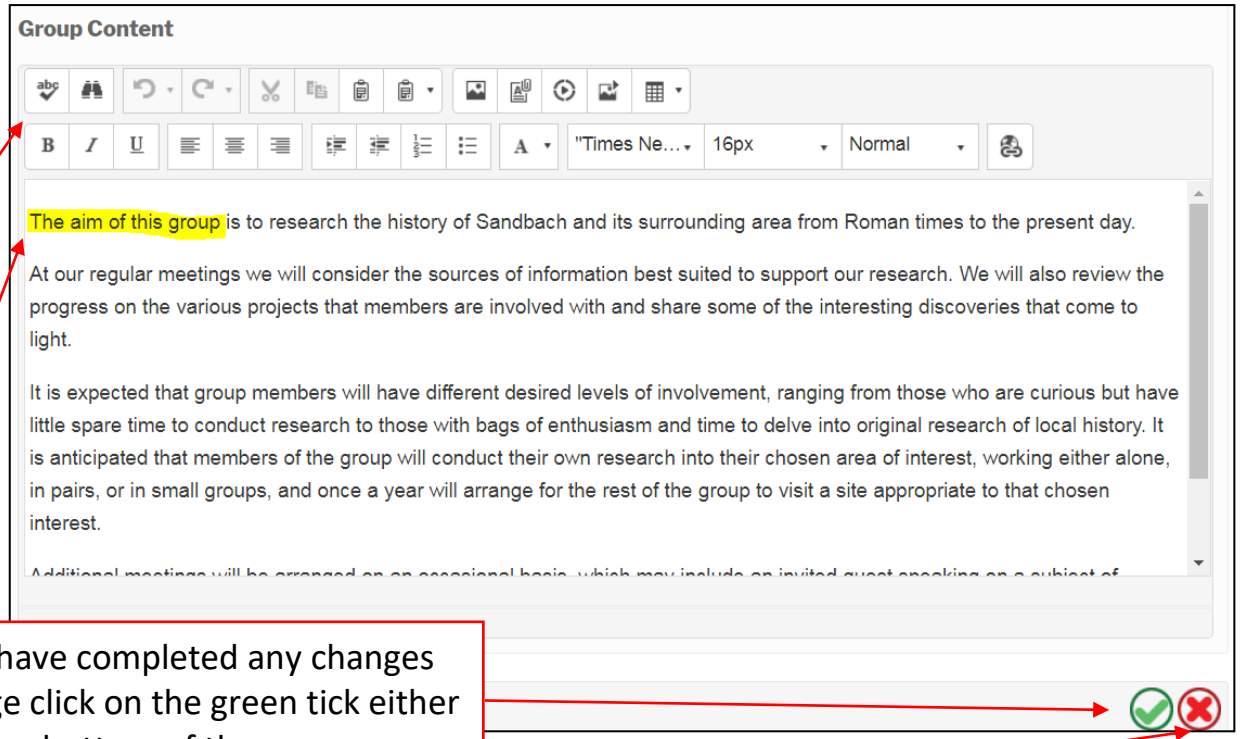


Edit Group con't

7. Group Content – Contains a description of your groups activities and can be edited at any time

Editing toolbar

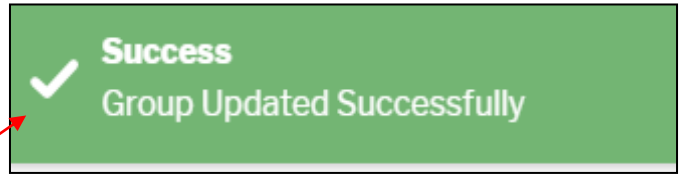
Click in the text box and type any alterations as required. The editing toolbar is available for various functions such as formatting your text.



Once you have completed any changes to this page click on the green tick either at the top or bottom of the page.

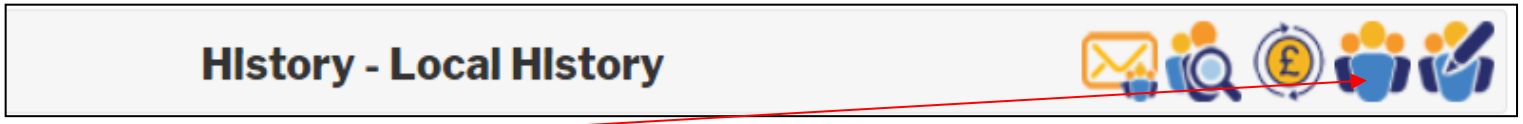
If you wish to cancel editing the page at any time, click on the cross but please be aware this will lose any changes you have made.

If you have edited the page and clicked the green tick you will receive this message.



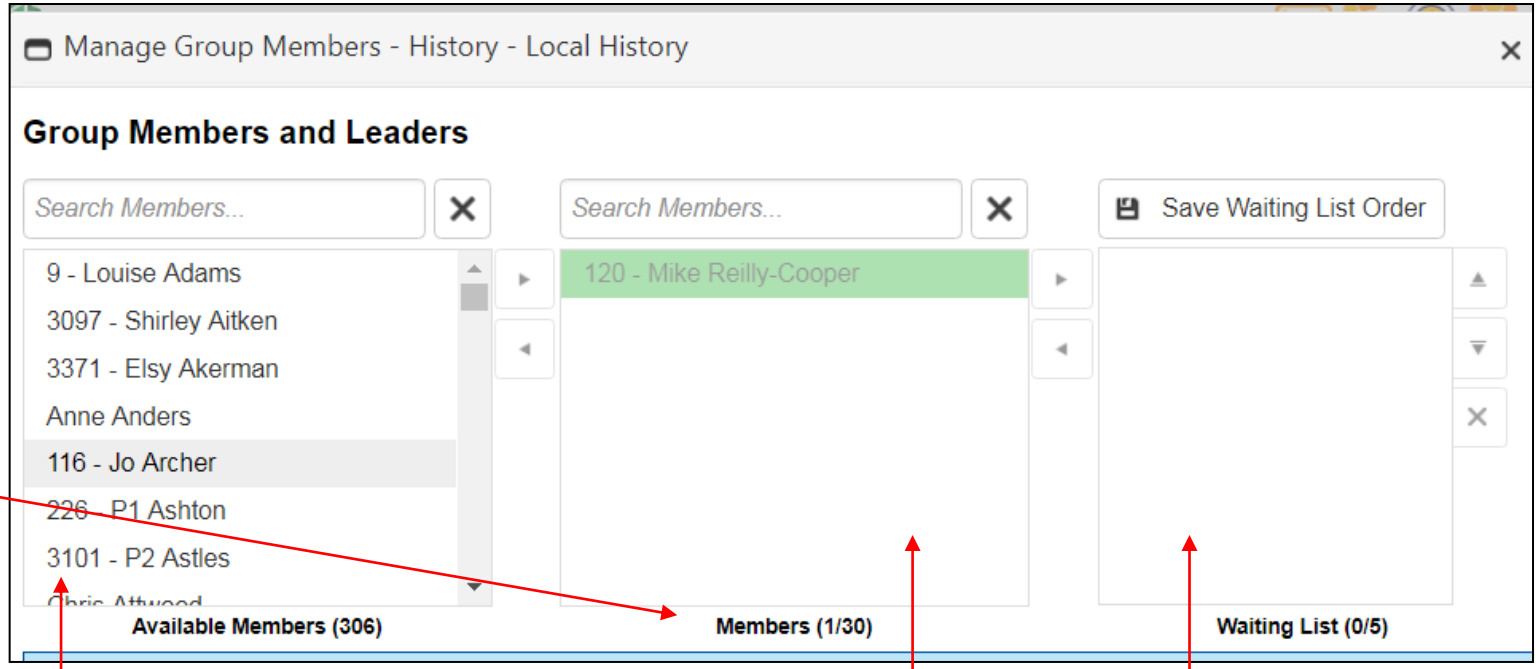
Manage Group Members

Click on the manage group members icon



The Manage Group Members page consists of 3 columns

The group size and waiting list which you have set up in the Edit Group page are shown beneath the middle and right columns

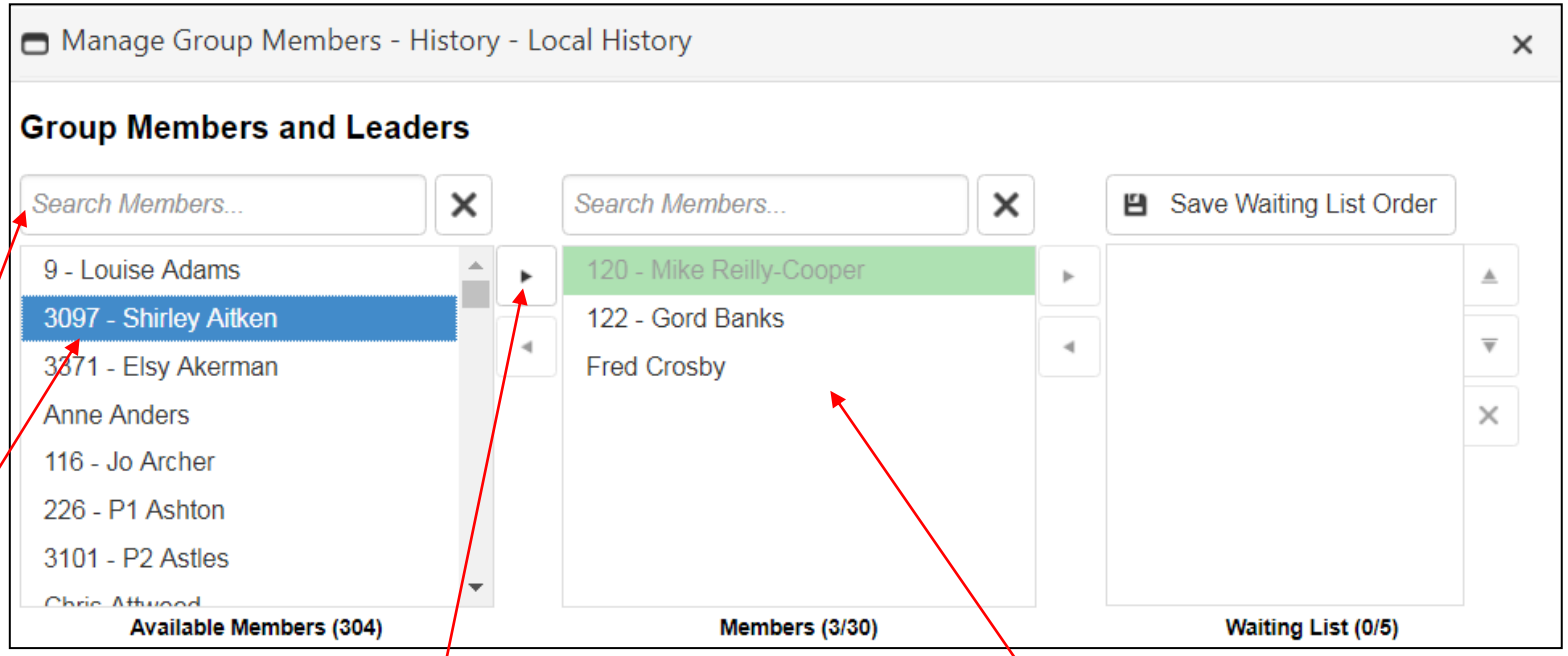


Displays the complete list of all Sandbach u3a members in alphabetical order

Displays the list of your group members, highlighted name(s) indicate group leaders/deputies

Displays your group waiting list

Manage Group Members con't



1. Add member Pt 1 - To add members to your group click on Search Members

Type in the surname of the person you want to select, click on their name so it is highlighted

NB: You can search for members by surname, first name or U3A membership number

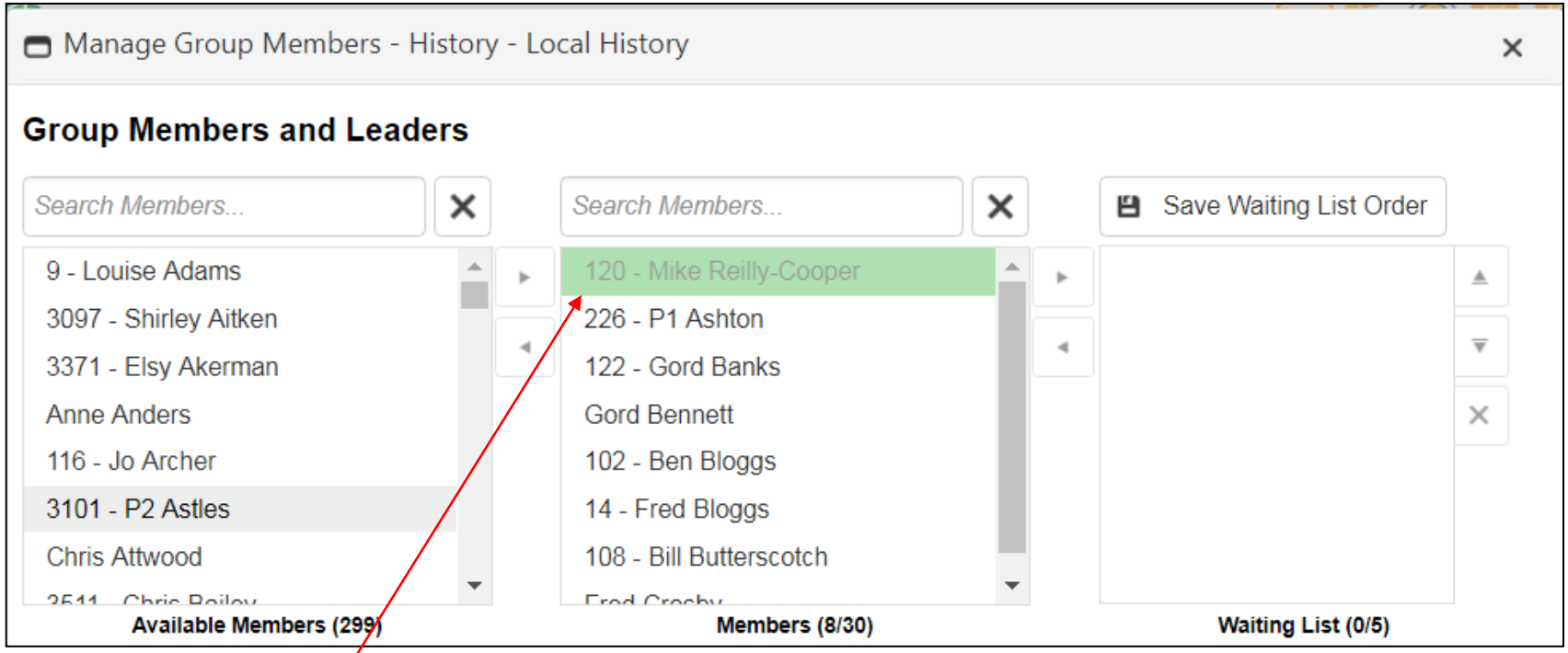
2. Add member Pt 2 - Copy this name into your group by using the right arrow or double clicking on the name

You can select multiple members at a time by holding down the Ctrl key

3. Add member Pt 3 - Continue to add all the names of the people on your register

The total number of members of your group will be displayed at the bottom of this column

Manage Group Members con't



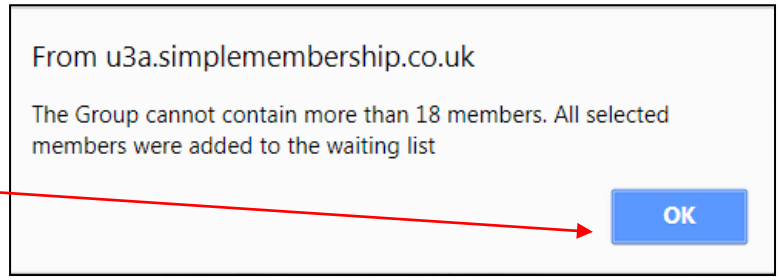
4. Group Leader – The names of the Group Leaders/Deputy Leaders have already been pre-selected. These are highlighted green and will appear at the top of the group.

NB: Any changes to the Group Leadership will need to be done by the Groups Coordinator

Group Leaders are displayed at the top of the group with other group members displayed below in alphabetical order by surname

Manage Group Members con't

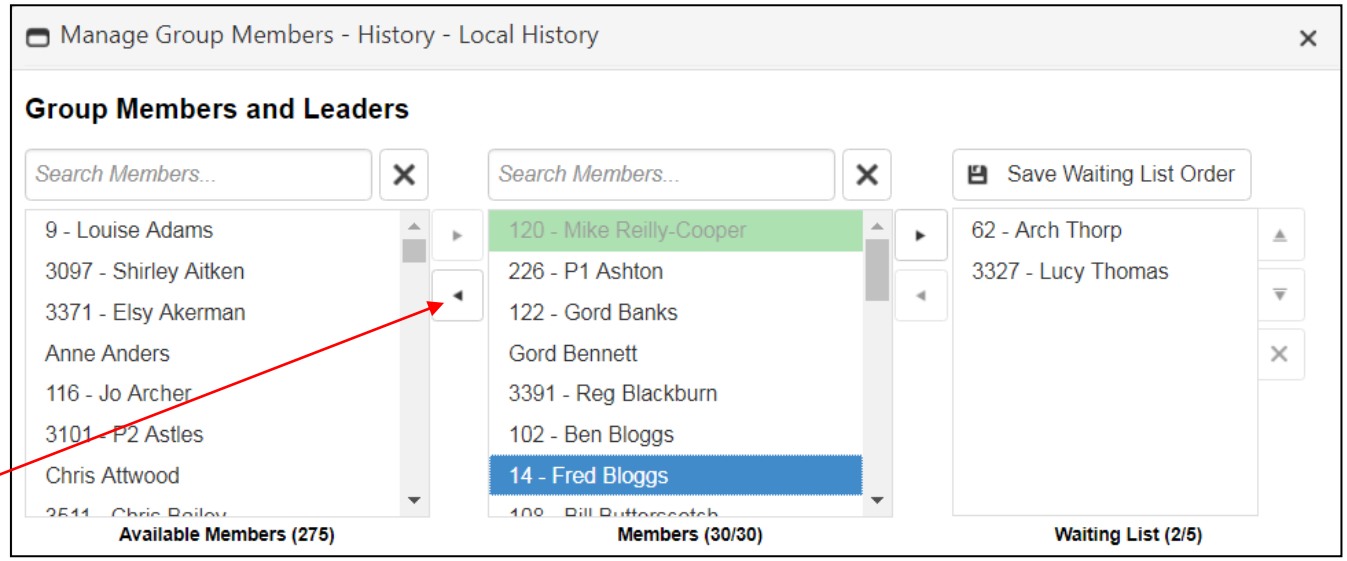
5. Waiting List - Once the maximum number for the group has been reached any names selected will be automatically added to the waiting list and a message to this effect will be displayed on the screen



NB: People on the waiting list can only be added to your group when there are vacancies.

6. Create a vacancy – to create a vacancy you will need to remove someone from your list or alternatively increase the size of your group in the Edit Group section

To remove a name click on it to highlight then use the left arrow to remove the name from your group



Manage Group Members con't

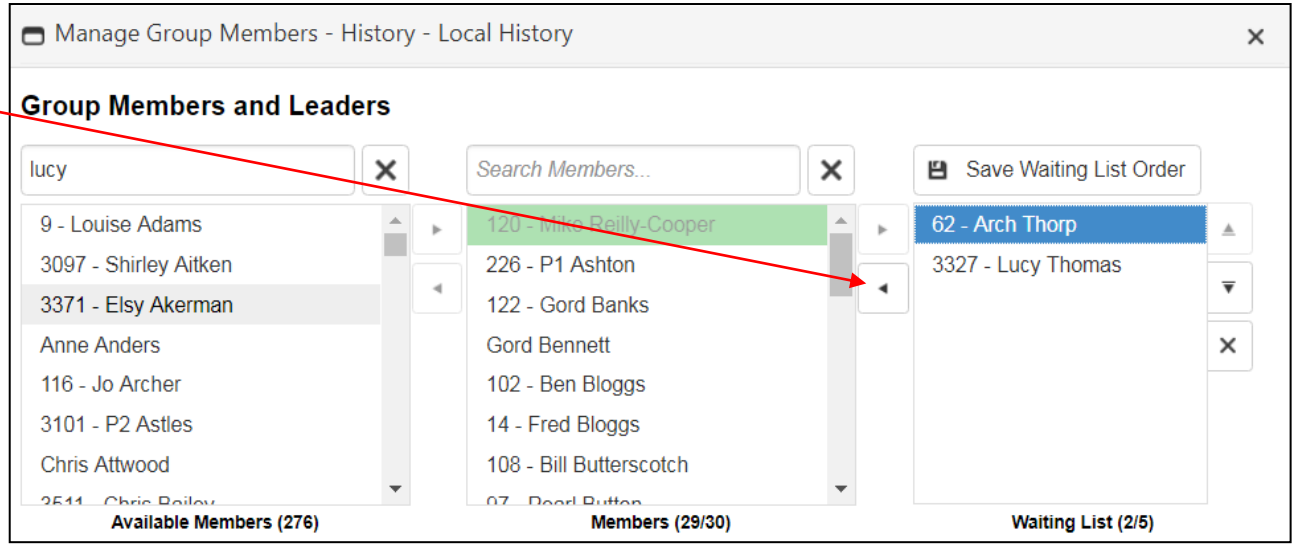
7. Add member from waiting list - To move someone from the waiting list into your group, highlight their name and use the left arrow

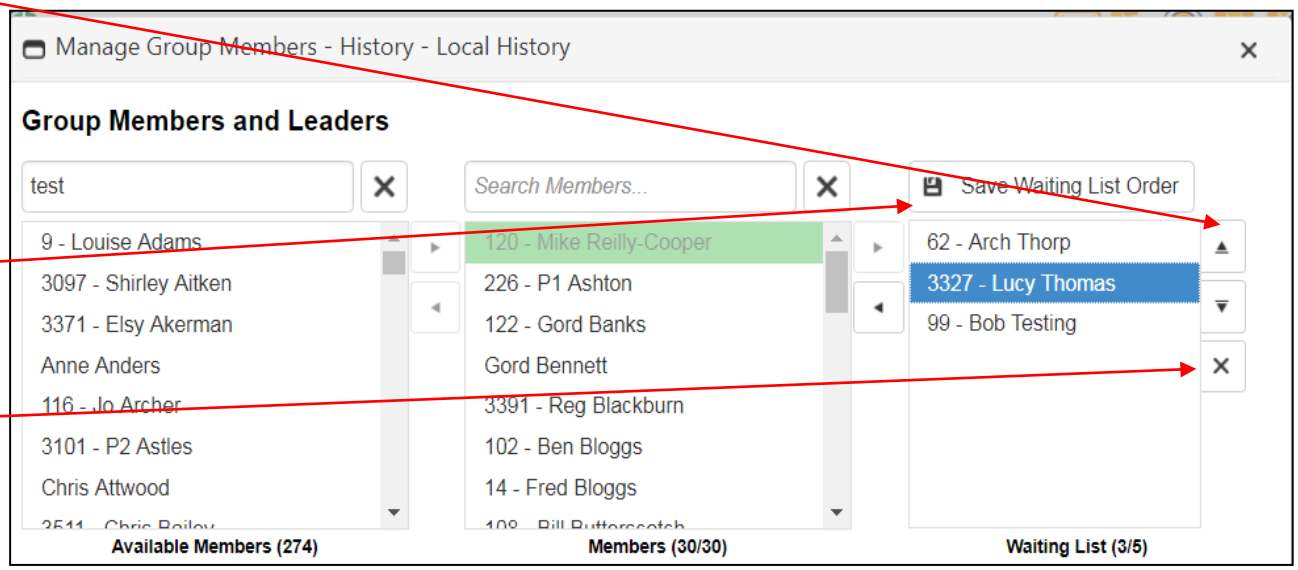
8. Manage waiting list - The waiting list puts people in first come first served order.

However you can move names up and down the waiting list by highlighting them and using the up and down arrows.

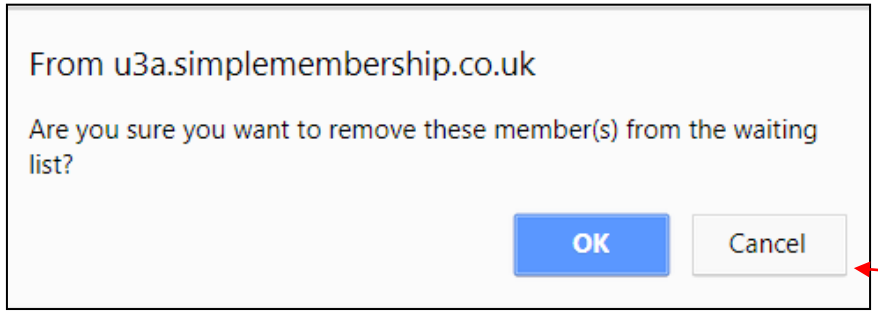
Remember to click on the 'Save Waiting List Order' button to keep the revised order.

9. Remove name from waiting list - you can remove someone from the waiting list by highlighting the name and clicking on the cross





Manage Group Members con't



If you delete a name from the waiting list you will receive a message to acknowledge that you have taken someone off the waiting list

Click OK or cancel

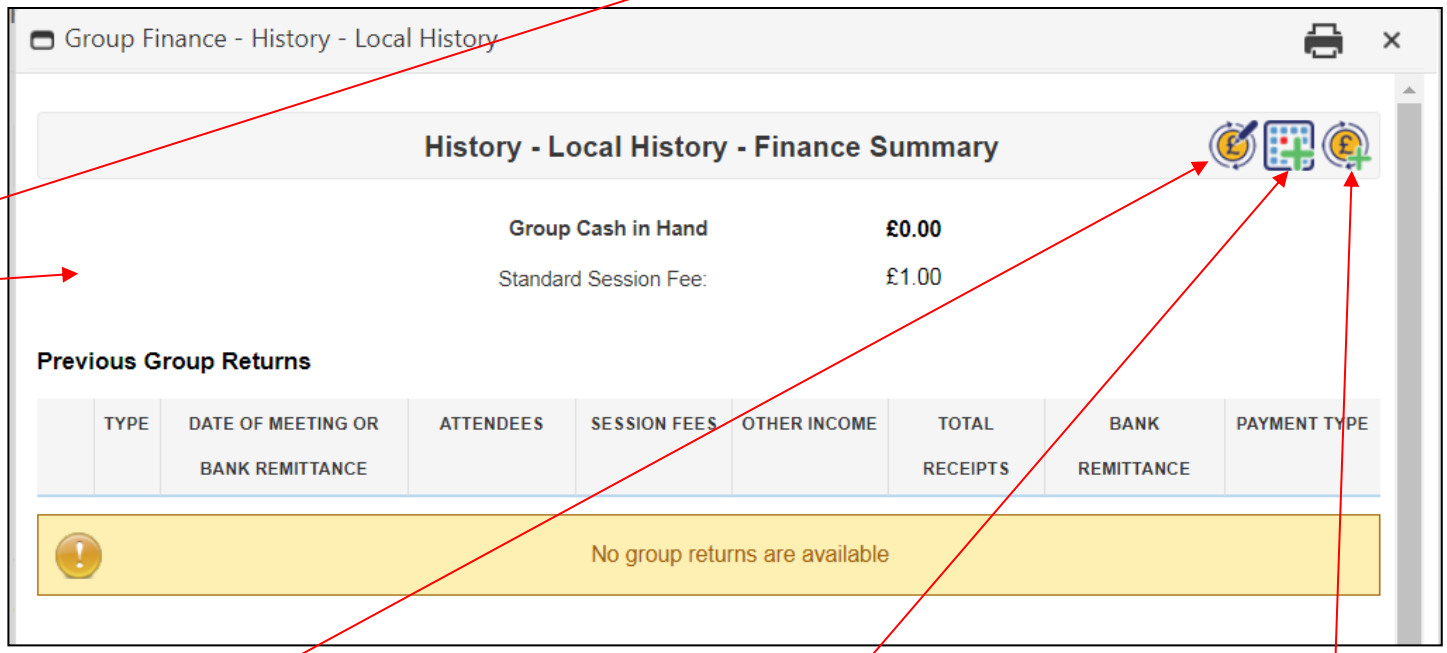
NB: For flexibility, the system will not actually prevent you adding more names to the waiting list than the number of places you have identified

The group page will display "Completely Full" if the number on the waiting list is at or above the identified size of the group

Group Finance

Online Payments
Please Note: For Group Finances where members may wish to pay online there is a separate guide available, "Group Finance Online Reporting Guide" which is to be read in conjunction with this guide

Click the Group Finance icon, the Finance Summary opens



1. Finance Summary – Displays the "Group cash in Hand" and "Standard Session Fee" at the top of the box and below this "Previous Group Returns"

This includes dates of meetings, number of attendees and Bank Remittance details

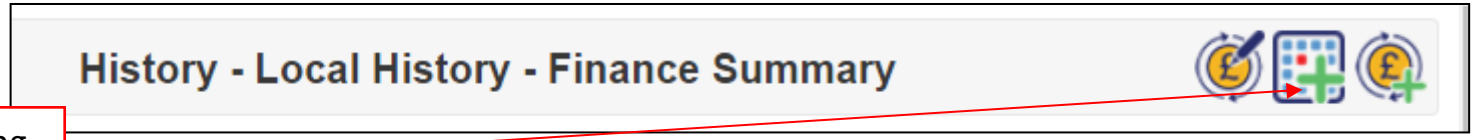
Edit Group Finance icon

(No longer required and is being removed)

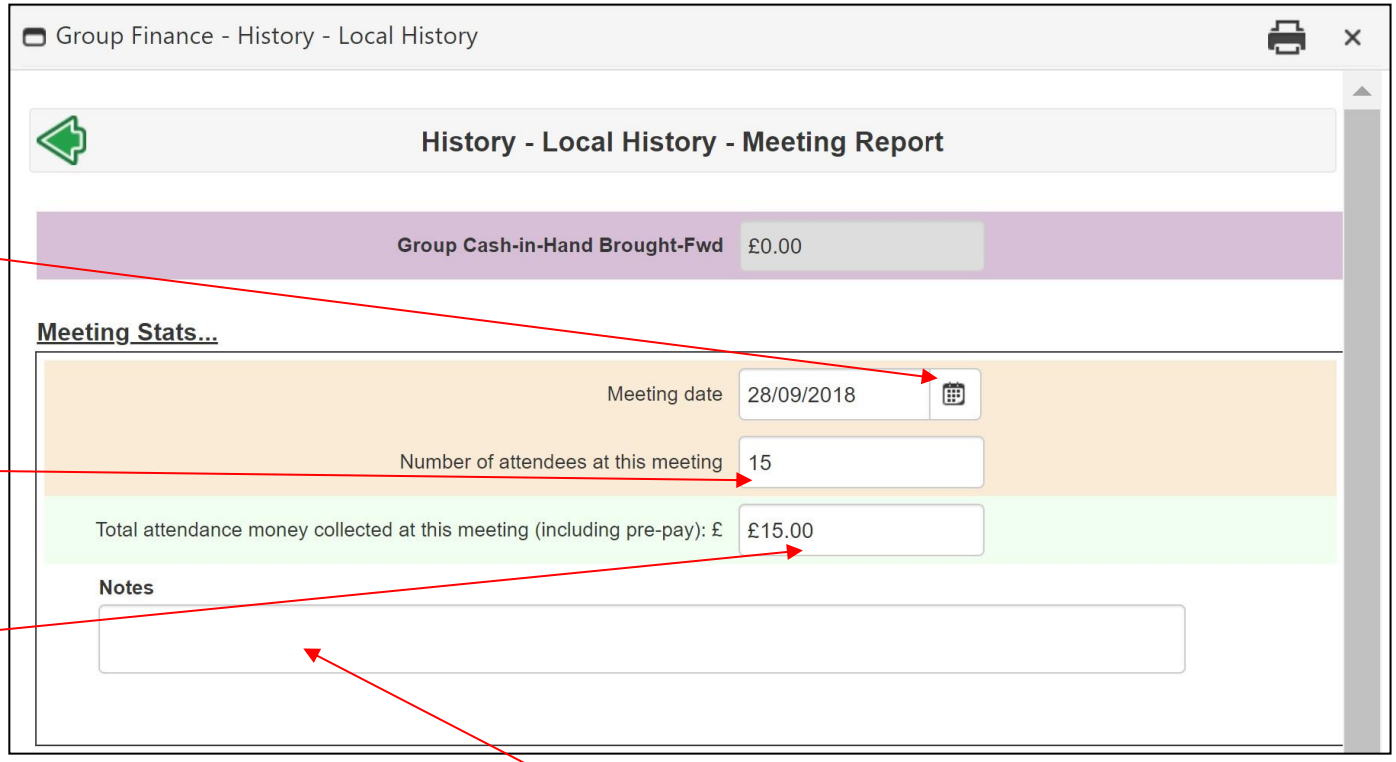
Add Meeting Report icon

Add Bank Payment icon

Group Finance con't



Click on the Add Meeting Report icon



2. Meeting Stats...

Meeting date – click on the pop-up calendar and select the date of your meeting or click in the box and simply enter the date

Number of attendees – click in the box and enter the number of people who attended the meeting

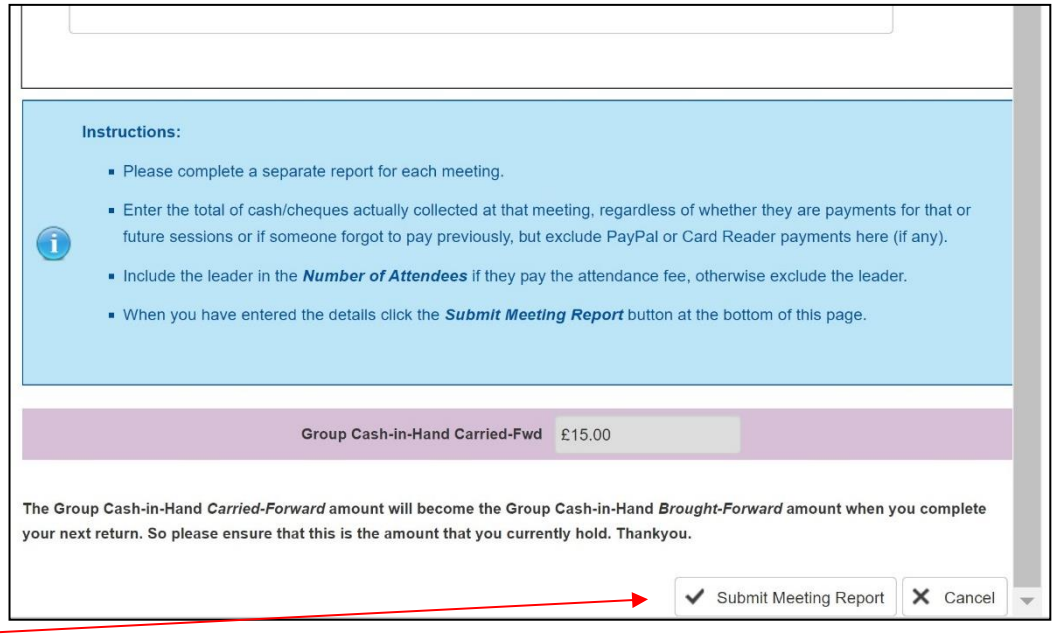
Amount collected in fees - Click in the box and enter the total amount collected at this meeting, including any prepayments for future meetings or the fee supplement charged to cover a paid speaker's fee

Notes box – Available if needed. Notes can be just for your own benefit and/or to explain unusual entries for the Treasurer's information, but please bear in mind that the Treasurer will not necessarily see the note unless you advise them directly: (treasurer@sandbachu3a.org.uk)

Group Finance con't

2. Meeting Stats con't...

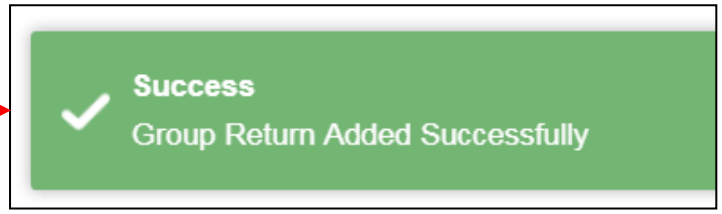
Scroll down the page to see an Instructions section, followed by a summary of the Group Cash-in-Hand Carried-Fwd and boxes for "Submit Meeting Report" and "Cancel"



3. When you have entered the details of the meeting click "Submit Meeting Report"

NB: Please submit a meeting report *at least* once every month

4. Once you have clicked "Submit report" you will be taken back to the Finance Summary page and will receive a "Group Return Added Successfully" message



u3a Sandbach & District

Group Finance con't

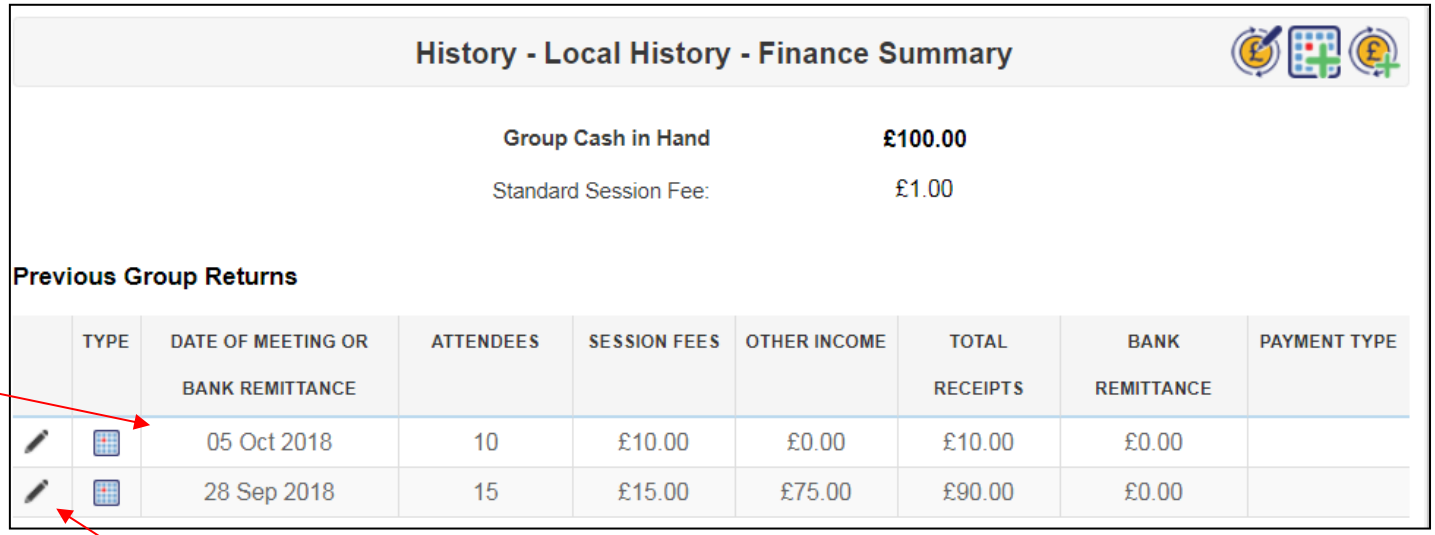
PLEASE NOTE: REGISTERS & ATTENDANCE FEES

- Please complete a separate report for each of your group meetings
- Please continue to keep a group register for emergency evacuation role call purposes and to identify which members have attended meetings and the amount of money collected
- Once completed all registers should be sent to the Groups Co-ordinator
- The nominal fee shown in the attendance fee box on the group page is the basic charge per session for your group
- A new function "Groups Events" is now available on SWISH for groups who arrange any special group visits, please contact the Groups Co-ordinator for further information
- If your group uses visiting paid speakers the attendance fee for these sessions will be higher. Leaders are therefore requested to include the higher rate that members are charged in the text at the top of their Group Content page

Group Finance con't

5. Finance Summary – The statistics for each meeting entered will be displayed giving the meeting date, the number of attendees and the amount of money collected at each meeting

Group Cash in Hand is detailed at the top of the page, this is the total amount of money collected but not yet banked



History - Local History - Finance Summary

Group Cash in Hand	**£100.00**
Standard Session Fee:	£1.00

Previous Group Returns

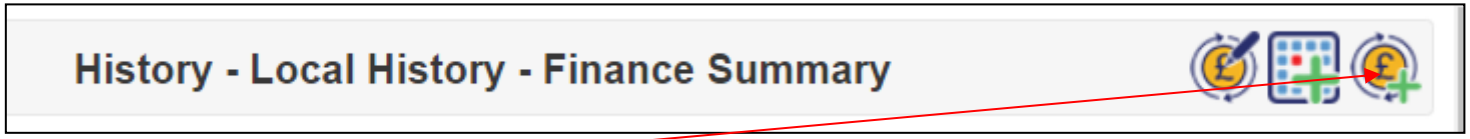
	TYPE	DATE OF MEETING OR BANK REMITTANCE	ATTENDEES	SESSION FEES	OTHER INCOME	TOTAL RECEIPTS	BANK REMITTANCE	PAYMENT TYPE
		05 Oct 2018	10	£10.00	£0.00	£10.00	£0.00	
		28 Sep 2018	15	£15.00	£75.00	£90.00	£0.00	

6. Corrections to the "Group Returns" statistics can be made by clicking on the 'edit pencil'

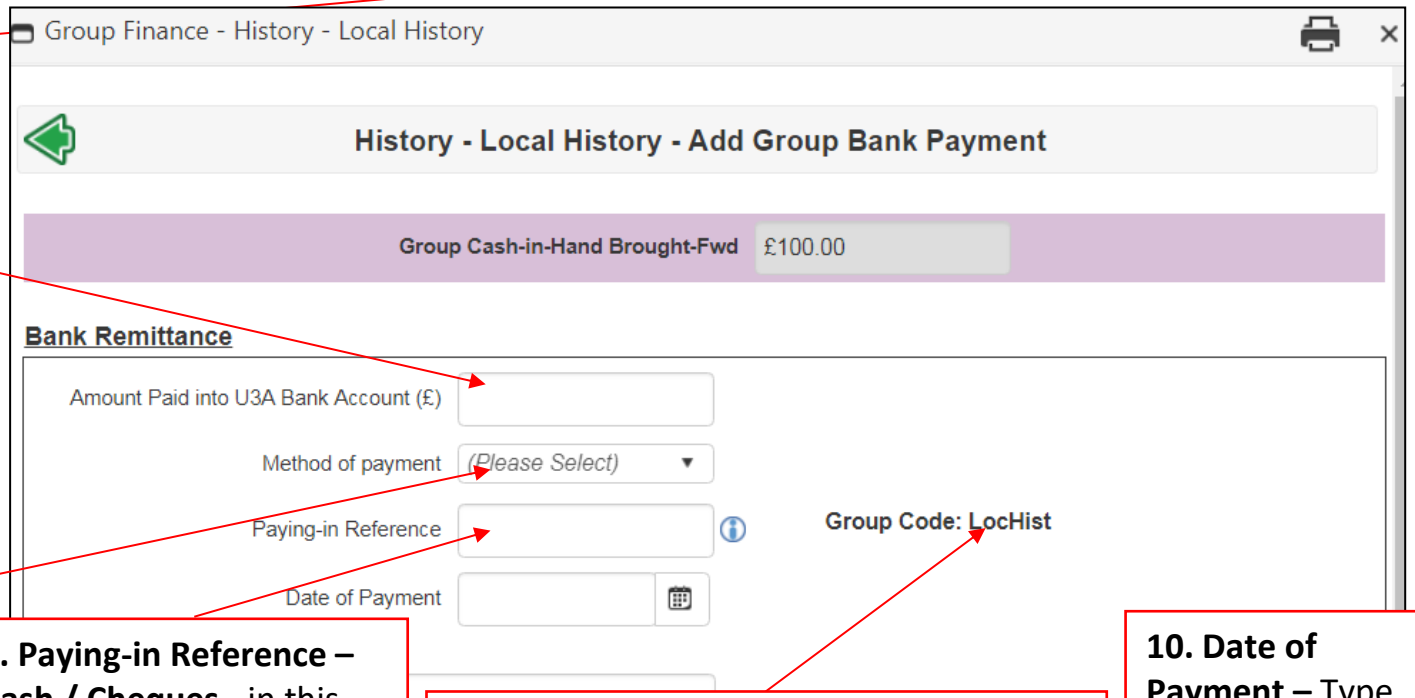
This will bring up the original return which can be corrected with the relevant information i.e. date, number of attendees or fees collected

To update the entry click "Save Meeting Report"

Group Finance con't

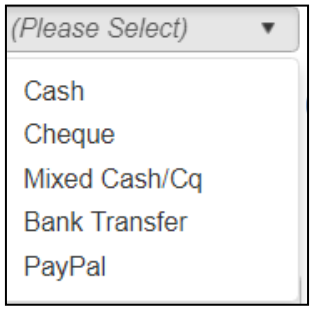


Click on the Add Bank Payment icon



7. Bank Remittance – Click on the "Amount Paid into u3a Bank Account" box and enter the money banked

8. Method of payment - Click on the drop down menu to select one of the following options:



9. Paying-in Reference – Cash / Cheques - in this box use the group's paying-in book, paying-in slip reference number (5/6 digit number which can be found at the bottom of the counterfoil)

9a. Paying-in Reference – Bank Transfer
Enter just your group code which is displayed to the right of the box.
Bank Account: *SANDBACH DISTRICT U3A*
Sort Code: *01-07-80*
Account Number: *52504107*

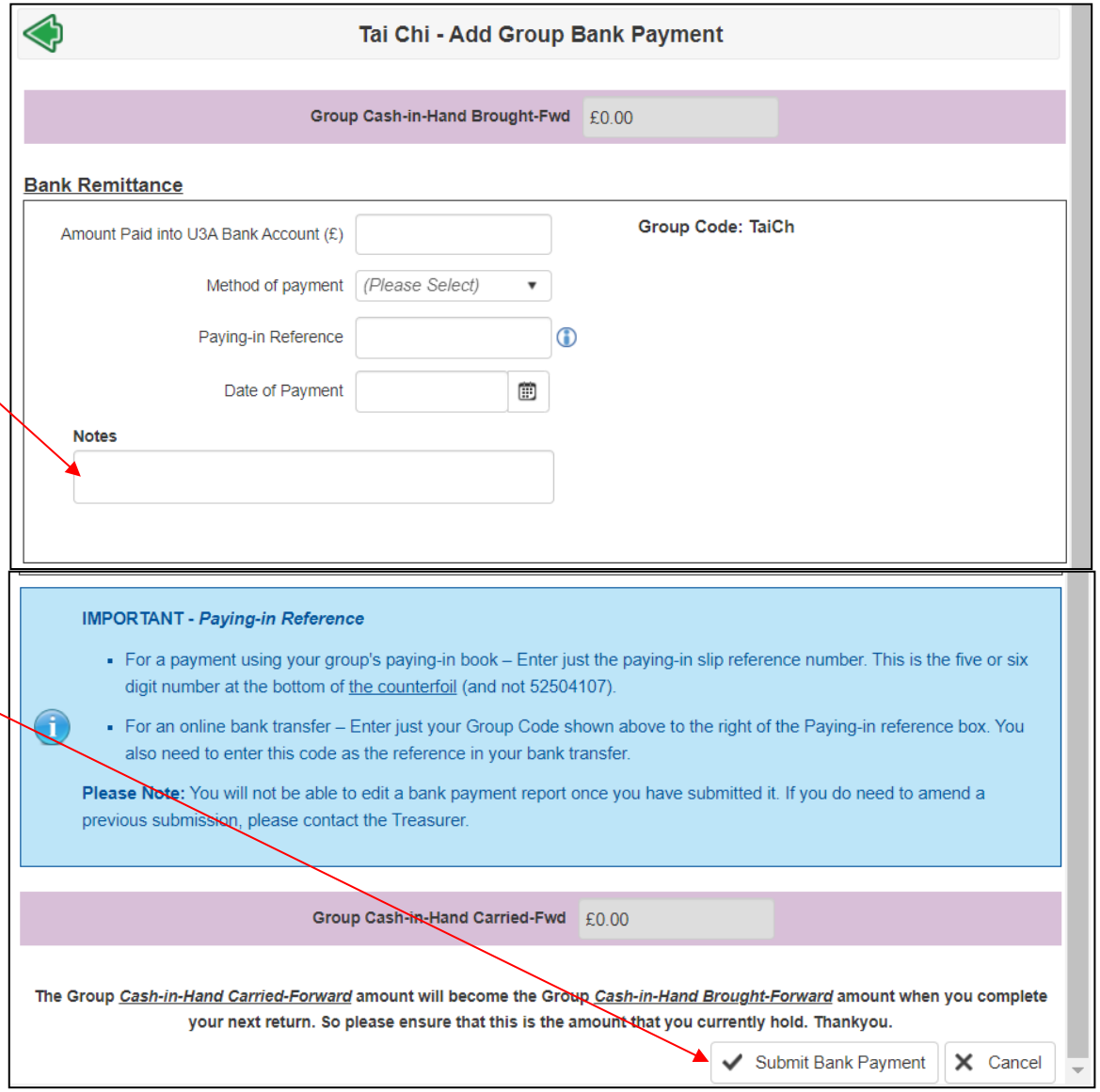
10. Date of Payment – Type the date the money was paid into the bank or select the date from the pop-up calendar

Group Finance con't

11. Notes box – Available if needed. Notes can be just for your own benefit and/or to explain unusual entries for the Treasurer's information, but please bear in mind that the Treasurer will not necessarily see the note unless you advise them directly: (treasurer@sandbachu3a.org.uk)

12. Submit payment – Scroll down to the bottom of the page and click on "Submit Bank Payment"

13. Once you have clicked "Submit Bank Payment" you will be taken back to the Finance Summary page and will receive the message "Group Return Added Successfully"



Group Finance con't

14. Finance Summary – This page will include all Bank Remittances as well as Group Meeting statistics and will be listed in meeting / banking date order

If you wish to retain any information for your own records please use the print icon at the top of the page

Alternatively you can copy and paste the Summary report into an Excel spreadsheet

Group Finance - Computing - Personal Laptop

Computing - Personal Laptop - Finance Summary

Brought Forward From Previous Year	**£0.00**
Group Cash In Hand	**£461.00**
Standard Session Fee:	£1.00

Previous Group Returns

Financial Year: 2019-20

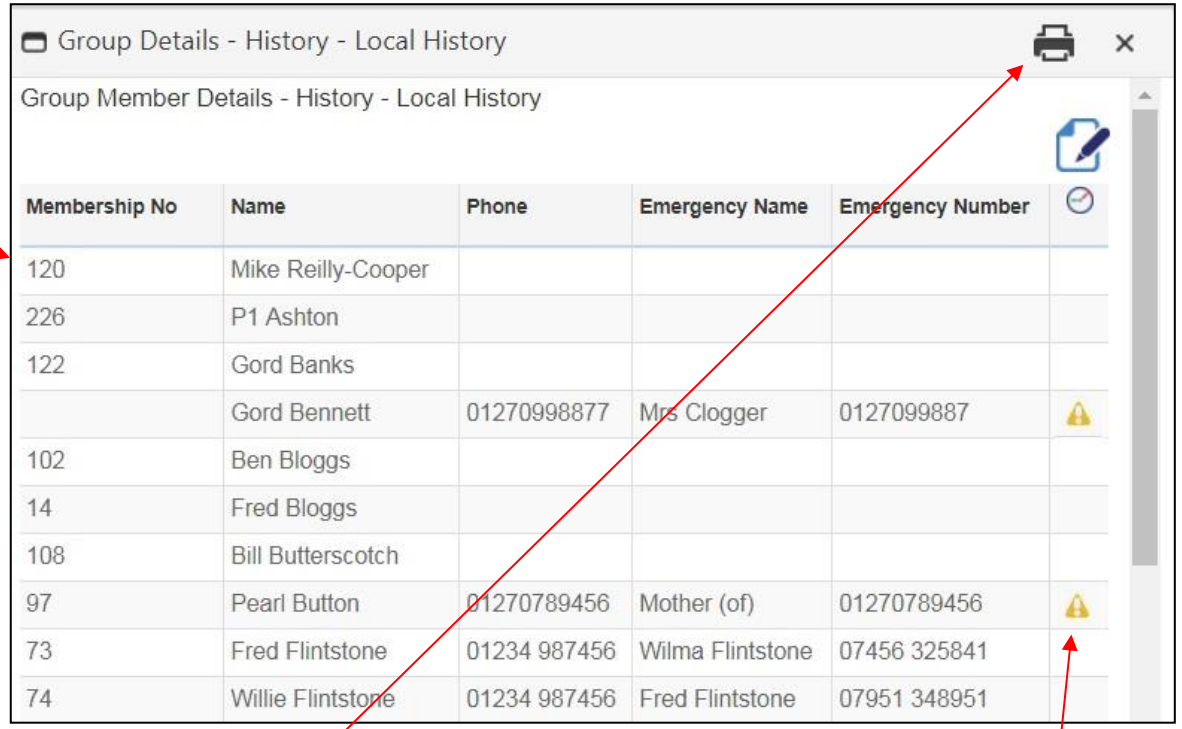
	TYPE	DATE OF MEETING OR BANK REMITTANCE	ATTENDEES	SESSION FEES	OTHER INCOME	TOTAL RECEIPTS	BANK REMITTANCE	PAYMENT REFERENCE
		19 Aug 2020		£0.00	£0.00	£0.00	£10.00	111
		12 Aug 2020	10	£10.00	£0.00	£10.00	£0.00	
		11 Aug 2020	12	£12.00	£0.00	£12.00	£0.00	
		05 Aug 2020	14	£14.00	£0.00	£14.00	£0.00	

NB: ***The Group Cash-in-Hand*** **Carried-Forward** ***amount from the Bank Remittance page will become the Group Cash-in-Hand*** **Brought-Forward** ***amount at the top of the Summary page and will be shown when you complete your next return***

If you make an error, and while the edit pencil remains visible, you can click it to edit bank payment reports. The edit pencil will be removed once the treasurer has taken account of your submission so you will need to contact them if further adjustments are required.

View Group Details

Click on the icon to view group details



Membership No	Name	Phone	Emergency Name	Emergency Number
120	Mike Reilly-Cooper			
226	P1 Ashton			
122	Gord Banks			
	Gord Bennett	01270998877	Mrs Clogger	0127099887
102	Ben Bloggs			
14	Fred Bloggs			
108	Bill Butterscotch			
97	Pearl Button	01270789456	Mother (of)	01270789456
73	Fred Flintstone	01234 987456	Wilma Flintstone	07456 325841
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951

The View Group page gives details of group members, showing group leader(s) first, followed by group members in alphabetical order.

It includes their phone numbers and in case of emergency (ICE) name and contact details.

This information is captured from each members "My Profile" page so will be automatically updated if they make any changes

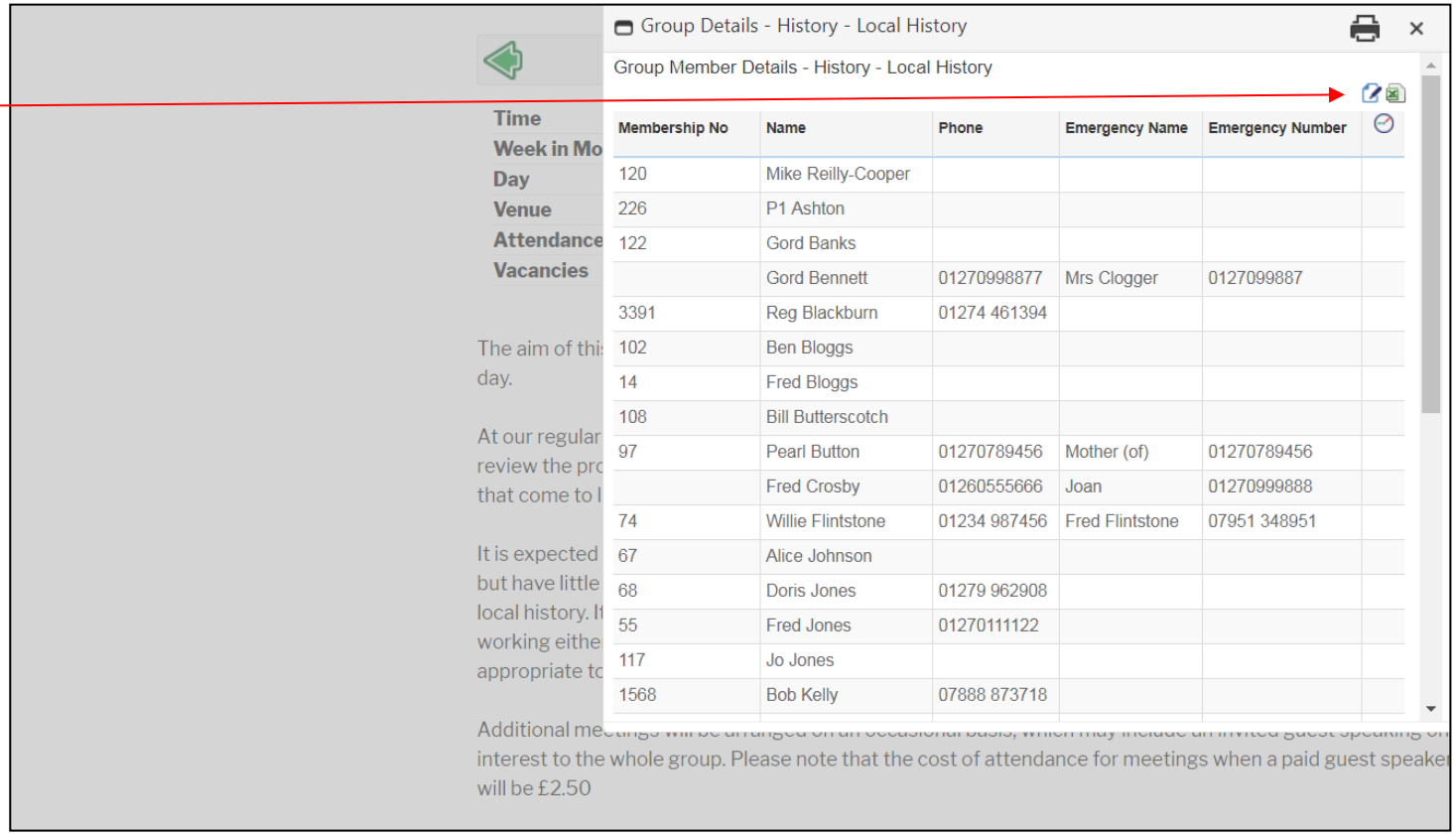
Group Leaders should encourage all the members of their group to check their own "My Profile" page for accuracy

1. Emergency Contact list - To print out details of all group members click on the printer icon

Renewal Overdue Warning: This symbol is to inform you if a member's renewal is overdue. If they do not renew by the end of October, their membership will be lapsed, and they will automatically be removed from the group.

View Group Details con't

2. Attendance Register - To create an attendance register either click the pen and paper icon for the PDF version or the X icon for the Excel version. A PDF or Excel register will be downloaded onto your computer or tablet where you will be able to view and print it with a suitable application. (e.g: Adobe PDF Viewer or Microsoft Excel.)



Membership No	Name	Phone	Emergency Name	Emergency Number
120	Mike Reilly-Cooper			
226	P1 Ashton			
122	Gord Banks			
	Gord Bennett	01270998877	Mrs Clogger	0127099887
3391	Reg Blackburn	01274 461394		
102	Ben Bloggs			
14	Fred Bloggs			
108	Bill Butterscotch			
97	Pearl Button	01270789456	Mother (of)	01270789456
	Fred Crosby	01260555666	Joan	01270999888
74	Willie Flintstone	01234 987456	Fred Flintstone	07951 348951
67	Alice Johnson			
68	Doris Jones	01279 962908		
55	Fred Jones	01270111122		
117	Jo Jones			
1568	Bob Kelly	07888 873718		

View Group Details con't

3. Attendance Register – PDF VERSION

Three Prepay Columns

This later version has three columns on the left where the amount paid by someone who is prepaying can be written in the column that is appropriate for their payment method, either by PayPal, Cheque or Cash.

Start Date

Enter the prepay period start date

End Date/No of Meetings

Enter the prepay period end date and the number of meetings

New Format

At the time of writing the .pdf version of the downloadable group attendance registers is being revised to accommodate prepayments and will soon appear in a similar format to the image on the right.

It is anticipated that a separate paper register will be printed for each prepay period.

The Excel version will remain a simple list of group members for leaders to adapt to suit their own needs. (See next page)

Group Register: Local History Group						Start Date:	End Date/No of Meetings:
			Pre-Payments			Meeting Attendance/Payments	
						Dates:	
Member			PayPal	Cheque	Cash		
25	Simple	Simon					
3511	Chris	Bailey					
122	Gord	Banks					
354	Shirley	Banks					
139	Brenda	Cowslip					
130	Betty	Nelson					
63	Fred	Oldbody					
133	Jill	Ratcliffe					
528	David	Smith					
104	James	Watt					
3511	Chris	Bailey					
122	Gord	Banks					

Pay on Attendance

The payments for those who are paying on attendance at each meeting should be recorded in the appropriate columns. Please write the meeting dates in the cells provided at the top of the columns.

View Group Details con't

6. Attendance Register – Excel version

The register lists the group in alphabetical order by surname with Group Leader(s) at the top of the list.

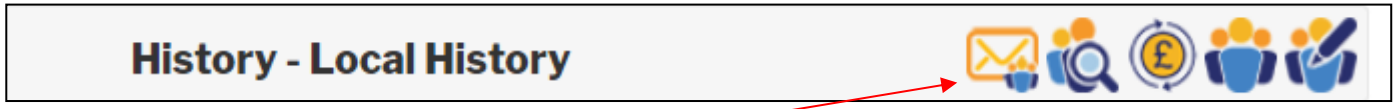
The U3A number, first name and surnames are all listed in separate columns, which allows you to sort the columns in whatever order you prefer

Fill in the session dates across the top of the page and allow space for prepayments to be added (see pdf version on the previous page).

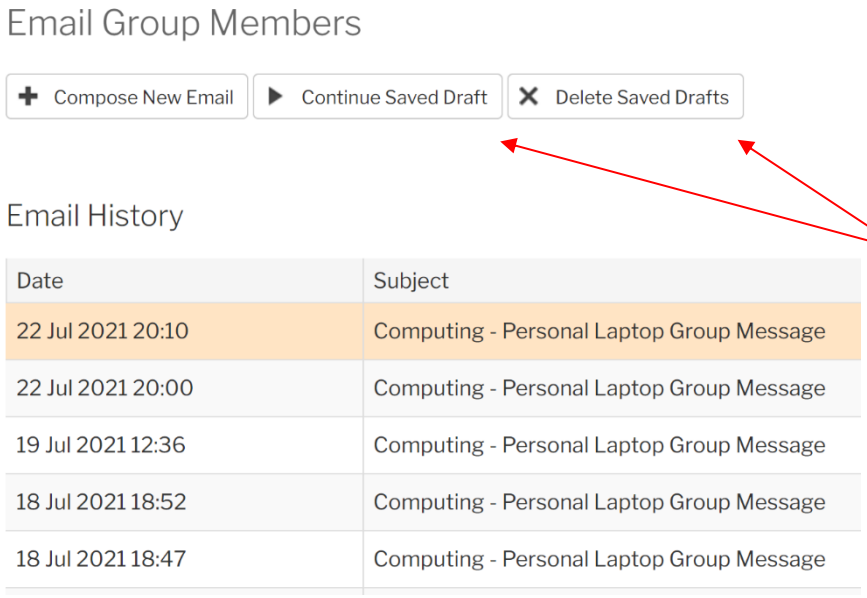
Group Register - History - Local History

Member																			
120	Mike	Reilly-Cooper																	
226	P1	Ashton																	
122	Gord	Banks																	
	Gord	Bennett																	
3391	Reg	Blackburn																	
102	Ben	Bloggs																	
14	Fred	Bloggs																	
108	Bill	Butterscotch																	
97	Pearl	Button																	
	Fred	Crosby																	
74	Willie	Flintstone																	
67	Alice	Johnson																	
68	Doris	Jones																	
55	Fred	Jones																	
117	Jo	Jones																	
1568	Bob	Kelly																	
1052	Gordon	Kelly																	
3125	Bill	Shaw																	
990	Sheila	Shearer																	
27	Sue	Simon																	
105	Bet	Smith																	
2050	Dave	Smith																	
558	Sushila	Smith																	
123	Baz	Test																	
82	Alice	Testing																	
52	Jan	Thomas																	

Email Group Members



Click on the icon to email group members



Compose New Email – click on this button to take you to Email Group Members page.

Saved Draft – Your email text is auto-saved every 1min and will remain available after leaving the email page and/or logging-out. The "Continue Saved Draft" and "Delete Saved Draft" buttons become available if a draft has been saved.

Email History - Summary of last 5 emails sent to group members arranged in date order, most recent date first. Click on the blue "i" icon to view the content of the email (View content feature is being added but may not yet be available).

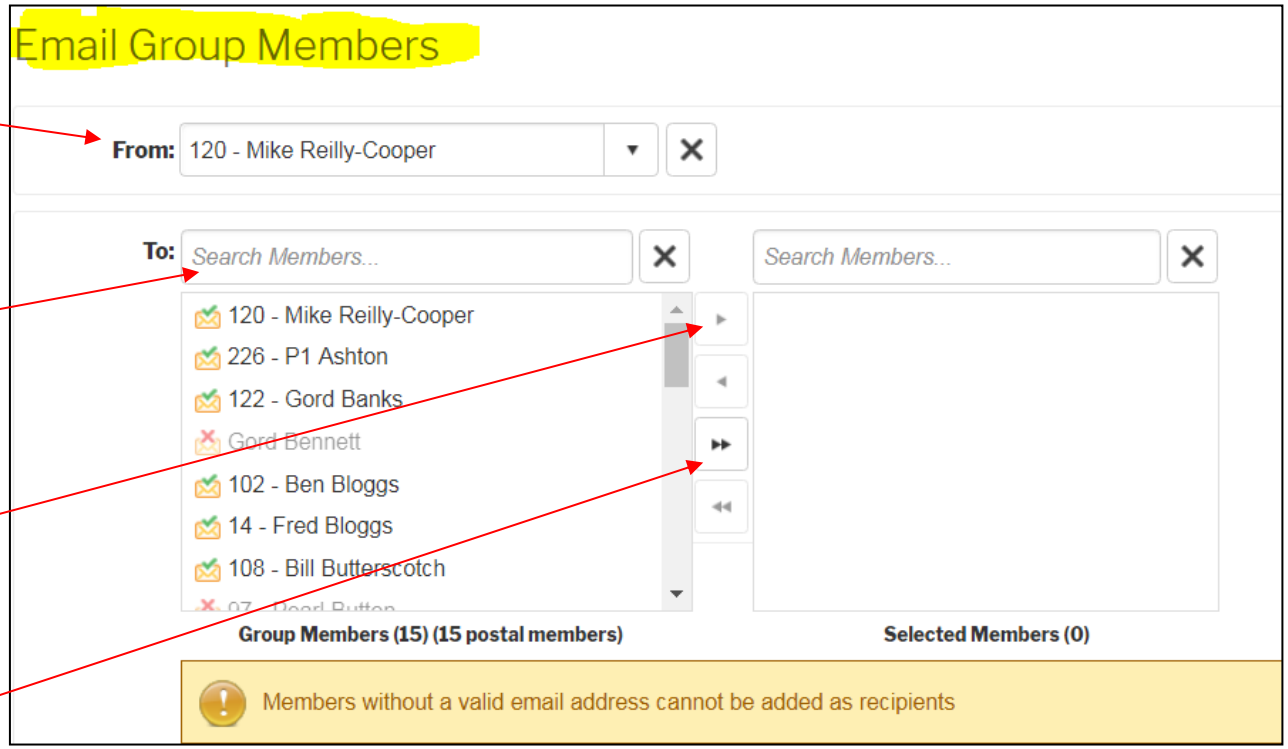
Email Group Members con't

1. Select sender – This will display your name as the sender.

2. Select recipients - If you want to email individual members use the Search Members box, double click or highlight their name.

Use the right arrow to add them to the recipients list in the right hand column.

3. Select recipients - If you want to e-mail all your group, click on the double arrow in the centre column this will automatically move all those group members with email addresses into the right hand column without having to select them individually.



NB: The SWISH system keeps a record of emails you have sent or have received in the My Profile area, email tab

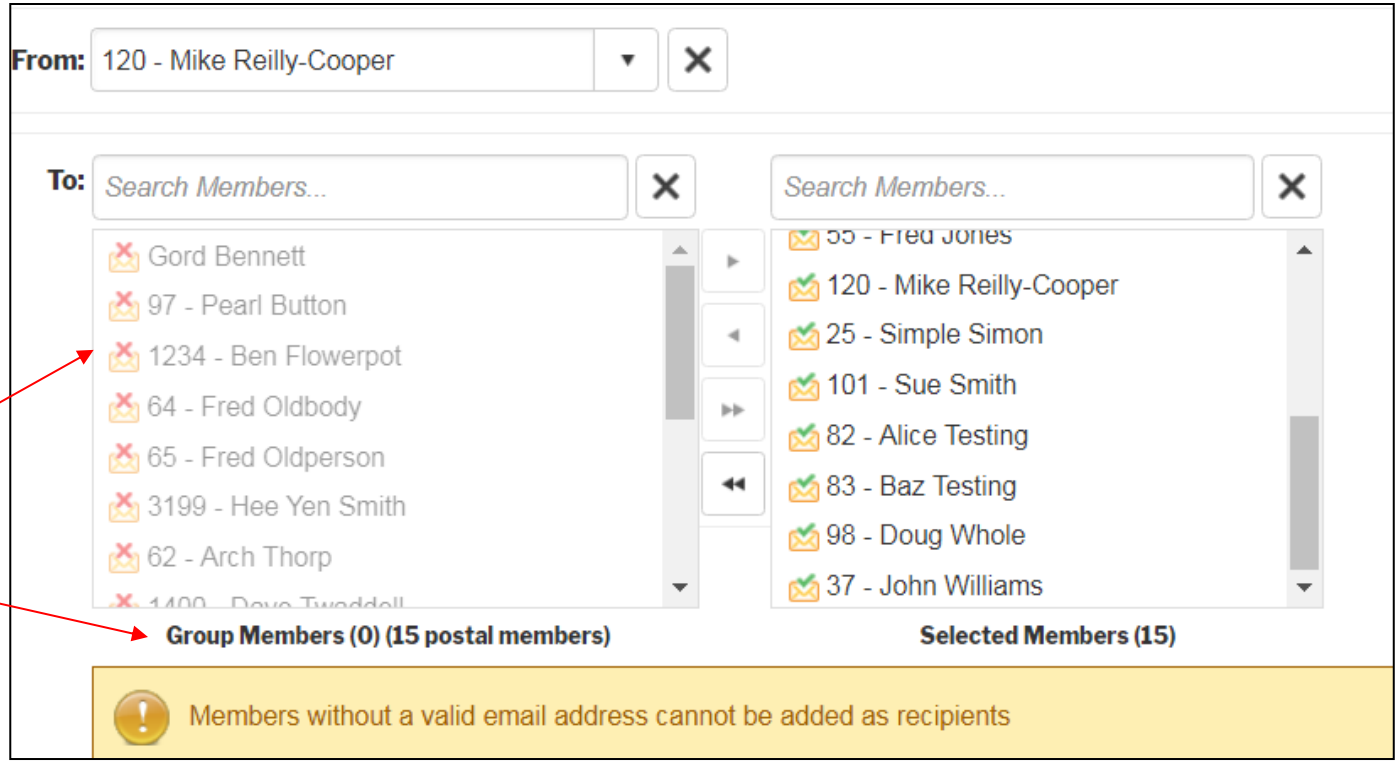
Email Group Members con't

4. Members without email - Members without a valid email address cannot be added as recipients and their names will remain in the left column with a cross on the email symbol.

A summary of members with email and those who are postal will be displayed at the bottom of the columns

A reminder message will also be displayed

Please keep them informed by post/phone

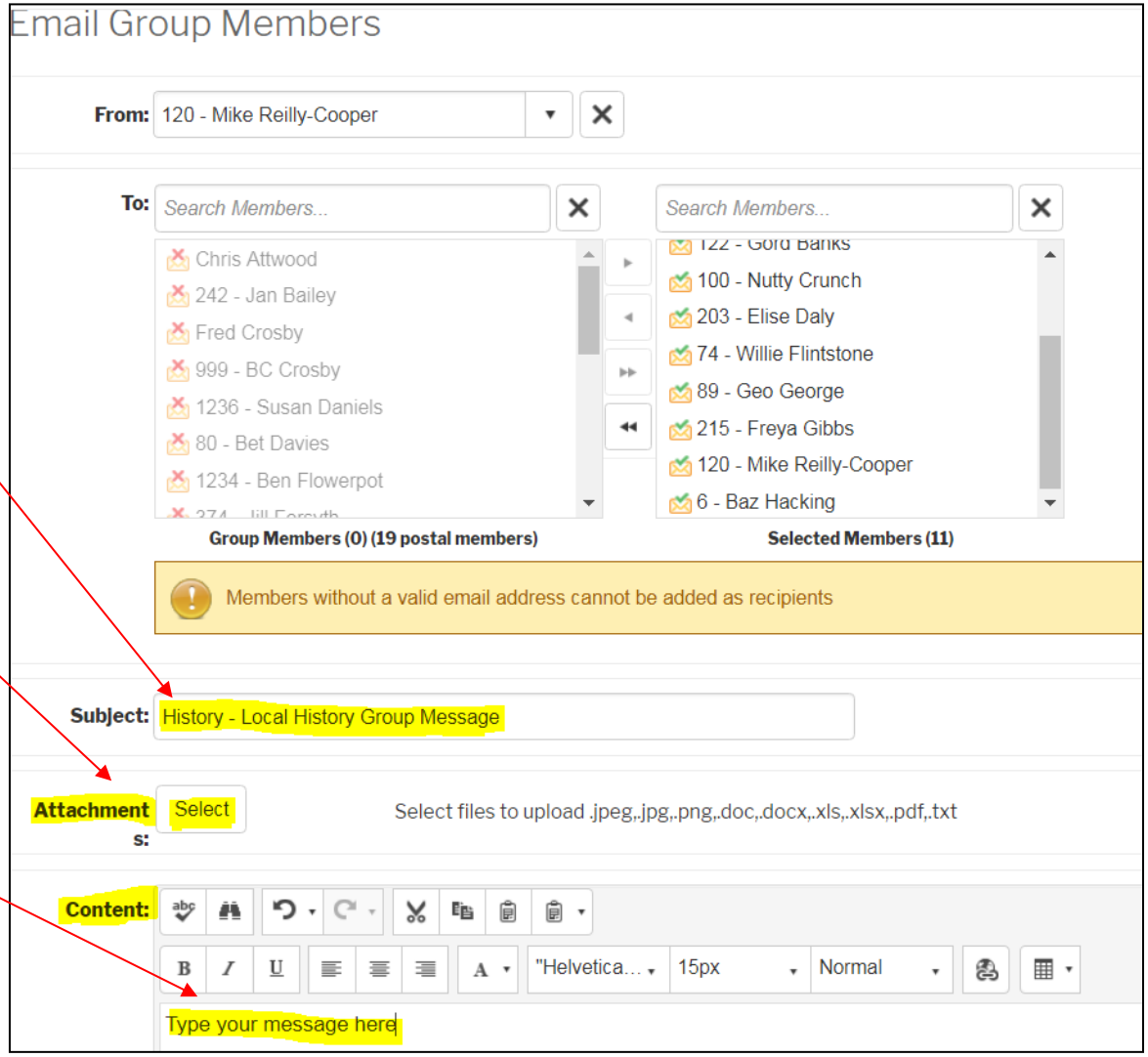


Email Group Members con't

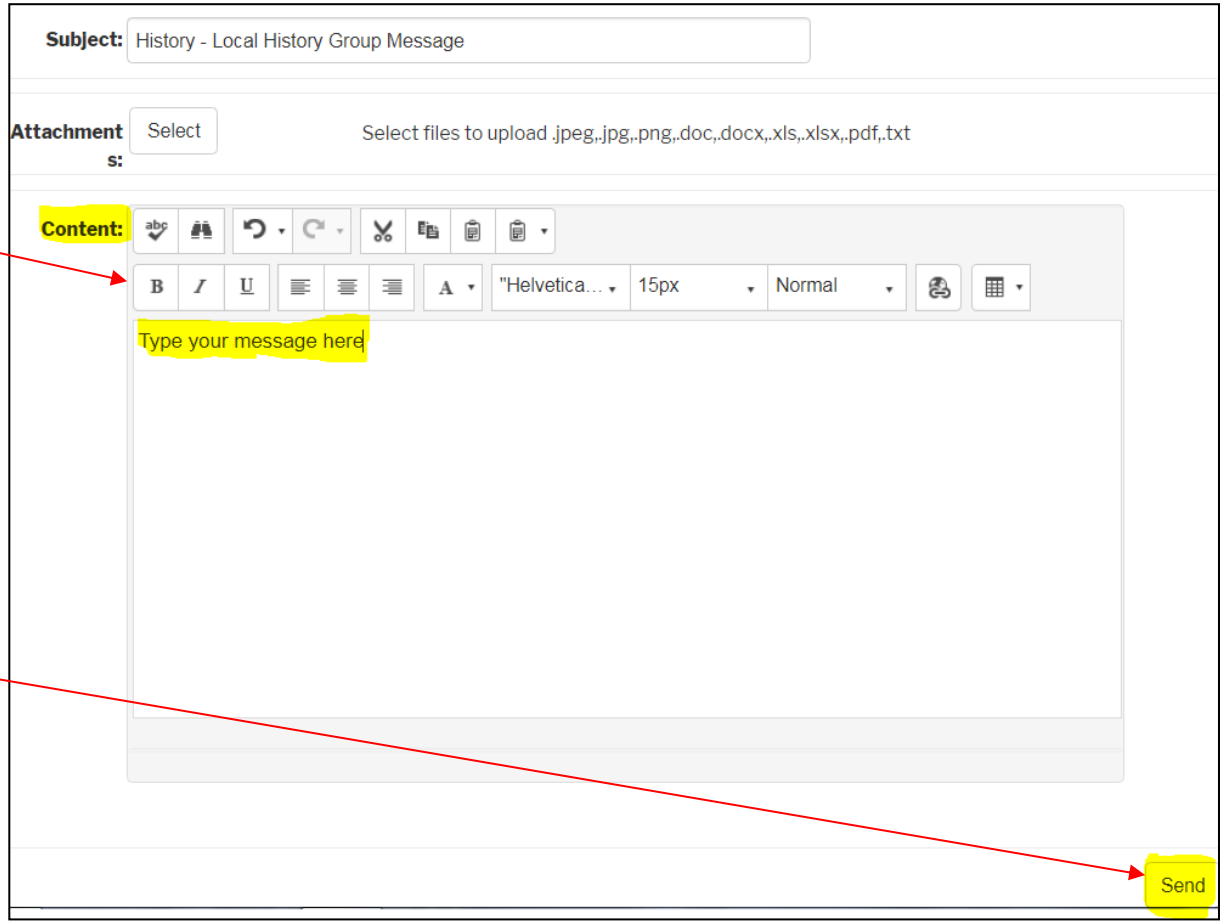
5. Group email subject heading – Amend the text in the subject box as required

6. Group email attachments - Add files as required by selecting the attachments button and choosing a file you want to share.

7. Group email content - Once you have selected the recipients click in the content box and type your message.



Email Group Members con't

8. **Editing tools** – use the editing toolbar to change font, cut and paste content, spell check, add tables, documents, images or a hyperlink etc

9. Group email send - When you have completed typing your message click on the send button at the bottom of the page