



MEMBER WIZARD Leaders' Guide

July 2026

This guide has been produced for Class Leaders. For further information or assistance Leaders should contact any of the following members of the Course Administration team:

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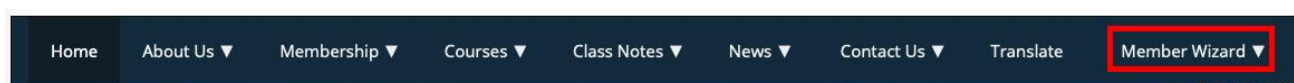
As a Class Leader, you will automatically have access to the **Leader Portal**. This is reached by first logging into the **Member Portal** as detailed below. This guide will explain how to access the Leader Portal and use it to:

- View enrolled and waitlisted students in your class
- Send Emails to your students, including use of email templates
- View Emails you have sent to your students
- Print Attendance Sheet for your class
- Print your Class List of enrolled students
- Print the waitlist for your class
- Upload Resources such as files or web links for your students.

Before you can use the Leader Portal or the Member Portal you must first register your membership and set a new password.

To **access** Member Wizard:

1. Go to our website: u3anunawading.org.au
2. From the main menu, click **Member Wizard** on the far right of the menu.



Registration

You only need to do this once.

1. Click **Member Wizard** → **Member Login** → **Register**.
 - Choose to register using either your **Member Number**, or your **email address** (the one you previously used with U3A Nunawading).
2. You will receive an email with a **security code**:
 - Enter this code on the Registration screen.
 - If you don't see the email, check your Junk/Spam folder.
3. Create your new **password** (make it a STRONG one). UMAS short passwords should not be used.
4. You will then be taken into the **Member Portal**.



Make a STRONG password

Ideally the password should have at least 9 characters which should include a capital letter, a number and a special character (eg: #, *, @).

Logging in after registration

Next time:

1. Go to **Member Wizard** → **Member Login**
2. Log in using:
 - either your Member Number or your email address, and
 - your password.
3. This will take you into the Member Portal from which you can access Member Portal Functions and the Leader Portal functions.



If you share an email address with another member, you must use your **Member Number**.

Member Portal Functions

What you can do in the Member Portal after logging in:

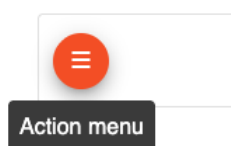
<i>If you want to....</i>	<i>Click on Menu item...</i>	<i>Then...</i>
Change your password	Change my Password	Enter your old password and then your new password (twice)
View and Update your Contact or Personal Details	Change my Contact Details	Click Edit Contact Details button at the bottom of your details.
Enrol in a Class	Classes	Browse or search the class list ... then Click either the Enrol Now or Join Waiting List button. Don't forget to click on Checkout to finish.
Indicate your interest in becoming a Volunteer	Classes	Enrol in one or more of the Volunteer classes at the top of the list of classes.
View your current Enrolments or Waitlists	My Classes	The Status column on the right indicates if you are enrolled or on a waiting list.
Put in an Absence (apology) for a Class	My Classes	Click on the class, Click Action menu item Advise Absence then tick each date you will be absent. <i>You need to do this separately for <u>each</u> class.</i>
Email the Class Leader	My Classes	Click on the class the Leader takes, Click Action menu item Contact Leader/Convenor , then compose and send email.
Print my Classes	My Classes	Click Action menu item Print My Classes . Then follow your own printer instructions.
Withdraw from a Class	My Classes	Click on the class, Click Action menu item Withdraw from Class . The system will send an email to Course Admin who will process the withdrawal within 2 days.
View emails Leaders or Course Admin have sent you via Member Wizard	My Received Communications	Double Click on the message you want to view OR Click on the message to select it, then Right Click and click View.
Renew your Membership for the next year	Renew Membership	(details to be advised in October Newsletter)
Display your Statement with amounts paid and owing	Statement	

<i>If you want to....</i>	<i>Click on Menu item...</i>	<i>Then...</i>
Access Class Resources loaded by your Class Leader/s or by Course Admin (eg Word docs, PDFs, images etc)	Documents	Double Click on the document. A preview will display, and you can also download a copy.
Access the Leaders Portal	Leader Portal	See below for Leader Portal Functions
Log Out of your session	Logout	Return Home then Log out

Can't see the Action menu?

First **select an item in the main pane**, then ...

- The left-hand menu will change to the Action menu
- OR Select the **red dot** at the top left
- OR Right Click on the item you selected



Accessing the Leader Portal

After you login to the Member Portal, the **Leader Portal** will be available on the **Main Menu**.



Home	Name Skippy Test
Change my Password	Member Number 27233
Change my Contact Details	Paid To
Classes	Membership Type Honorary
My Classes	Group Not in any groups.
My Events	Last Refreshed 30 Apr 2026 17:26
My Communications	
Renew Membership	
Statement	
Documents	
Leader Portal	
Log out	

Note that at this stage, Member Wizard still has a number of references on screens and reports to “Tutor” rather than “Class Leader”. This will change over time.

Leader Portal Menu

Click on the **Leader Portal**, and you will see a list of classes you are leading. Once you select a class the greyed-out menu items on the left will be available for selection.

1

Students

2

Email

3

Manage Templates

4

Communications Sent

Mark Attendance

Advise Absence

Class Details

5

Print Attendance Sheet

6

Print Class List

Print Waiting List

7

Class Resources

Select a Class

StatusActive

Class Name	Enrolled Students	Wait list	Maximum Number of Students
26TEST TEST COURSE 2026	7	1	7
26DANRR3 Rock 'n' Roll Intermediate 1	60	3	60
26DANRR5 Rock 'n' Roll Intermediate 2	39	0	39

The **Mark Attendance** and **Advise Absence** functions will not be used initially. You can View (but not edit) **Class Details**.

1 **Students** allows you to view enrolled and waitlisted students. Select Enrolled or On Waiting List from the Student Status dropdown.

Student status

Enrolled

Enrolled ✓
 On waiting list

Number of students:
 Maximum: 7 Enrolled: 7 Waiting List: 1

Name	Enrolled	Phone	Date Added	Class Period Invoiced
AbbTest, Bachtiar	CourseC@u3anunawading.org.au	0444 999999, 03 9999 999	24 Feb 2026 01:53	
AbrTest, George	CourseC@u3anunawading.org.au	0413 999 999	24 Feb 2026 01:47	
AmbTest, Kennedy	CourseC@u3anunawading.org.au	0401 999 000	24 Feb 2026	

2 Email your students

There are two options for sending emails to your students:

- Using your own private email: you can obtain your students' emails from the Class List. Please be sure to use BCC for members' emails, unless you have obtained permission from all students for their emails to be visible.
- **Using the Member Wizard Email facility to send emails to your students.**

Select the class and click on the **Email Member** option ² which will bring you to the **Email Students** webpage. Select **Membership Status "All"** (other options are not relevant to Nunawading), then **Class Status** Active, choose the relevant class or classes, and select the **Enrolment Status** (you will usually just want "Enrolled"). Then click **Next**.

Membership Status: All

Class Status: Active

Classes: 26TEST TEST COURSE 2026

Enrolment Status: Enrolled (selected), On Wait List, All (Enrolled + Wait List)

Selecting recipients

You can send to all students by ticking **Select All** or only send to some students by ticking their individual names, then click **Next**.

☒	Last Name	First Name	Primary Email	Paid to
Select / Un-select all				
☒	AbbTest	Bachtiar	CourseC@u3anunawading.org.au	9 Dec 2025
☒	AbrTest	George	CourseC@u3anunawading.org.au	9 Dec 2026
☒	AmbTest	Kennedy	CourseC@u3anunawading.org.au	9 Dec 2026
☒	BanTest	Debasis	CourseC@u3anunawading.org.au	9 Dec 2026
☒	Mutton OAM	Elsie	emutton39@gmail.com	13 Jan 2027
☒	Test	Anne	CourseC@u3anunawading.org.au	9 Dec 2026

When you email students using this facility, if a student clicks the Reply button the email reply address will be your email address.

Prepare your email using the form including any attachments then click **Send**.

If the email message is regarding a class cancellation, please email a copy to Course Administration by ticking Email Co-ordinator so we are aware of the cancellation. At Nunawading, the Office Administrator email will also be Course Admin and need not be ticked.

You can **format** your message and include links using the toolbar.

You can **attach files** by clicking the **Add Attachment** button

You can also **personalise your greeting** to each member of your class by using the **Merge Tag** on the extreme right-hand end of the toolbar.

Eg: If you start the body of the email with "Dear ", position the cursor after the space then click on the merge tag icon and select "First Name" - you will see this text appear: *Dear {{first_name}}*. Member Wizard will populate the emails individually with the first name.

Dear {{first_name}} {{last_name}} {{member_number}} would insert all three member detail fields into the email.

A pop-up window will confirm that the email has been sent.

Using an existing template

If you regularly send emails with the same or similar content (eg with a weekly attachment with class material or instructions), you can use an email template you have previously saved (See **3** below for instructions on saving and managing templates).

To use a saved template, simply click on **Add Template** and select the template you wish to retrieve. Then modify the email as you wish and enter a **Subject** before sending.

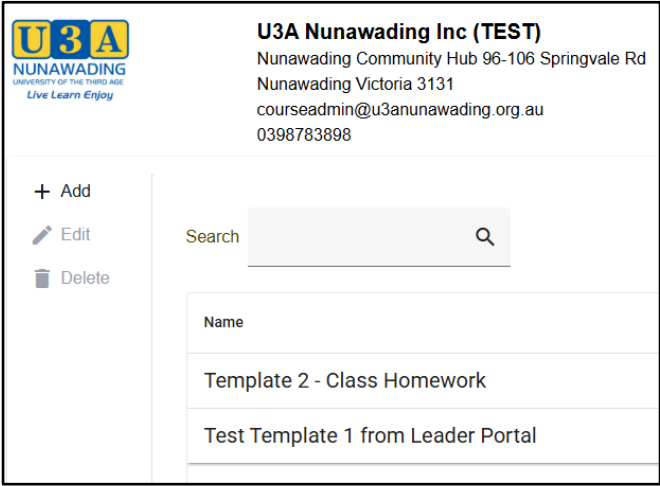
3

Manage Email Templates

The Manage Templates menu allows you to add a new template or edit or delete an existing template. If you have already saved any templates they will be listed here.

To Add a template:

- Click **Add**
- Give the template a name
- Complete the email as if you are about to send it (without attachments usually).
- Save.



U3A Nunawading Inc (TEST)
 Nunawading Community Hub 96-106 Springvale Rd
 Nunawading Victoria 3131
 courseadmin@u3anunawading.org.au
 0398783898

+ Add
 Edit
 Delete

Search

Name

Template 2 - Class Homework

Test Template 1 from Leader Portal

To Edit an existing Template:

- Highlight the template in the list. This will make the Edit and Delete menu items available
- Click on **Edit**
- Edit and **Save** your template

The template can then be used as described in the **Email** section above.

4

View emails you have sent

To view all emails you have sent click on **Communications Sent**.
Select the period you are interested in from the Date Range.

4

Date Range	This Financial Year	Search
Date Sent	Description	Communication Type
30 Apr 2026 18:37	Test Course Class Cancellation 28th April 2026	Members
30 Apr 2026 18:29	cccc	Members

Double clicking on a particular email will open the email including a list of the members it was sent to.

5

Print Attendance List for your Class

Select a class and click **Print Attendance Sheet** to print the Attendance Sheet. Tick the boxes exactly as shown and select the relevant Term for printing. You can add additional lines if you wish.

5

Print Attendance Sheets

Include withdrawn/moved students ☐

Show Logo ☐

Sort By ☐ Last Name ☒ First Name

Print Details ☒

Print Tutor Labels ☒

Print Phone Numbers ☐

Print Member Numbers ☒

Print Attendance Totals ☐

Print Footer ☐

Print Dates ☒

Use Class Start/Finish dates ☐

Date Range 2026 Term 2

A blank Attendance Sheet is generated listing all the students, including the Leader. Any absences already entered will show as “AP” on the Attendance Sheet.

Attendance sheet

U3A Nunawading Inc (TEST)

Class 26TEST TEST COURSE Weekly on Monday 10:00 AM - 11:00 AM at
2026 Nunawading Community Hub (NCH)

Max Students 7 **Enrolled students** 7

Tutor(s) Skippy Test

Secondary Tutor(s) Ken Briscoe (brickenlin@gmail.com)

Dates Covered 20 Apr 2026 - 15 Jun 2026

P = Present AP = Advised Absence Empty = Absent/Unmarked

Member	20 / 4	27 / 4	4 / 5	11 / 5	18 / 5	25 / 5	1 / 6	15 / 6
(Tutor) Skippy Test #27233			AP					
(Secondary Tutor) Ken Briscoe #20433								
Anne Test #21446								
Bob AbbTest #22929								
Debasis BanTest #23263								

6 Print Class List and Print Waiting List

Select a class and use **Print Class List** to print the enrolled students list or use the **Print Waiting List** to print the waitlisted students list.

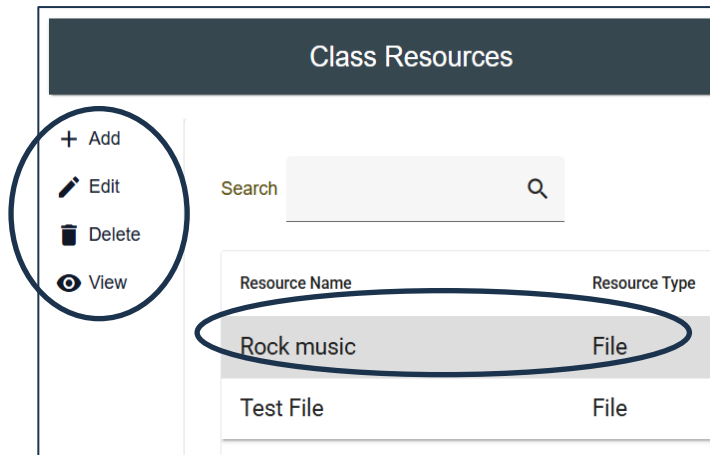
Student Status:	Enrolled						
Class:	26TEST TEST COURSE 2026						
Tutor:	Skippy Test						
Subject:	ART AND PHOTOGRAPHY						
Venue:	Nunawading Community Hub (NCH),						
Schedule:	Weekly on Monday 10:00 AM - 11:00 AM						
Cost:							
Dates:	2 Feb 2026 - 16 Nov 2026						
Max Students:	20						
Student Count:	7						
Places Available:	13						
Name	Email Address	Phone Number	Emergency	Member Number	Membership Paid To	Date Added	Notes
(Tutor) Skippy Test	skippy@u3anunawading.org.au			27233			
Bob AbbTest	CourseC@u3anunawading.org.au	0444 999999	Enrolled - 22929	22929	9 Dec 2025	24 Feb 2026 01:53	
George AbrTest	CourseC@u3anunawading.org.au	0413 999 999	Jenny, 25/29 Spouse 0413 999069	2529	9 Dec 2026	24 Feb 2026 01:47	
Kennedy	CourseC@u3anunawading.org.au	0401 999 999	Jenny, 25/29	2529	9 Dec 2026	24 Feb 2026	

There is no facility to export your class list to a .csv file at this stage, other than by highlighting the columns in the screen above, then right click or Ctrl-C to copy, and paste into Excel.

7

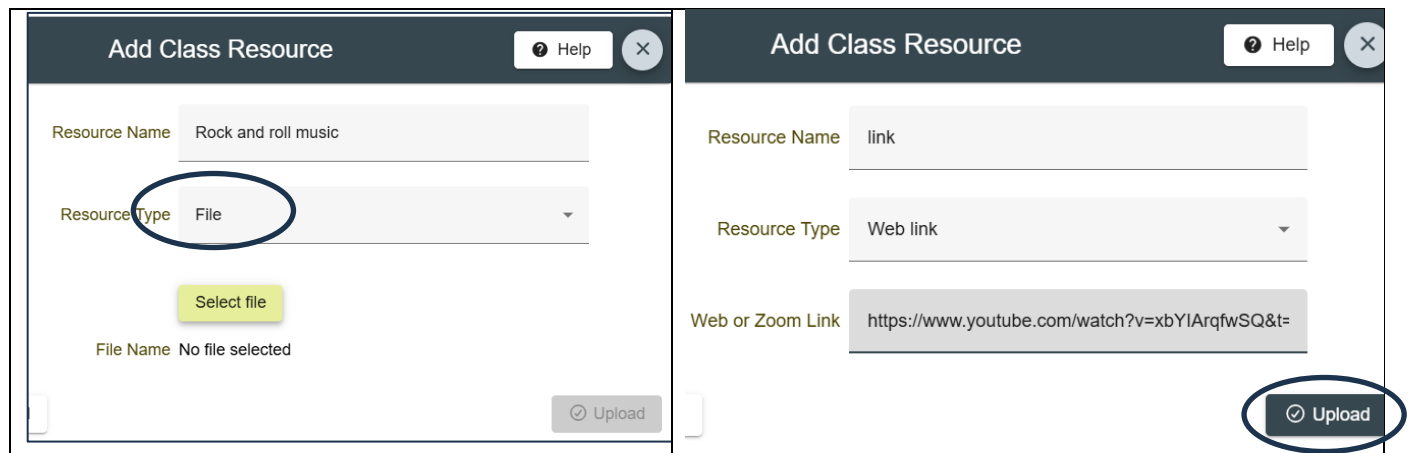
Class Resources

Leaders can upload files or web links for students of a particular class to view and download.



To view all uploaded files, select a class and click on **Resources**. 7 You can select an existing upload to view, edit or delete.

To add a resource, click on **Add**. You can add a file from your device or type in a web address and click on **Upload**.



Notes