U-MAS Upgrade to Version 6.08

Upgrade instructions

U-MAS Version 6.08

This pack contains

1. The key features in this release with description on how they operate and function

2. Steps to upgrade

The new features will be shown at the User Group meeting Tuesday 9 April

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Courses (1)

The Course Listing date range at the bottom of View or Select Courses
Fixed to show a course with a start date before the selected date range but a finish date within the range
Same with Send Email Enrolments

| List All Courses | Dates between: dd/mm/yyyy | and: dd/mm/yyyy |

Add Course max enrolments missing scroll up and down
Fixed. Course max enrolments to force number

Maximum enrolments: 4

Reports>Courses>Courses>Download daily dates calendar CSV fields are incorrect
Fixed. "Finish date" should be "Finish time"
"Date" should be "Finish date"

	D	E	F	G	H
	Locations	Start Date	Start Time	Finish Time	Finish Date
	Rabbit Hole	3/07/2023	9:00	10:00	4/09/2023

Reports>Courses>Find all courses tutor is responsible for
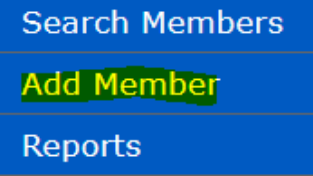Fixed. A new course may not have be shown for new course

New course inconsistent end date - Core and U4M
Fixed - both end dates are aligned to remain "new" till the end of the nominated course start date

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Courses (2)

Level 3 can Add Member in Core
Fixed

Add Course / Copy Course check Code NEW
Check if the Code has been used before
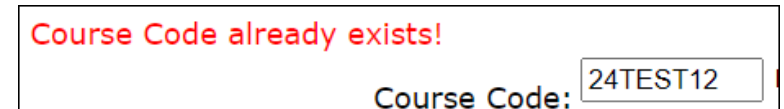Once the code has been entered it will advise if it has been used previously

members.u3avictoria.com.au says
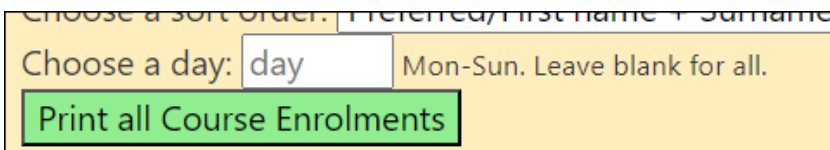Warning this Course Code already exists: 24test12
OK

Course Code already exists!
Course Code: 24TEST12

Print all course enrolments NEW
add day sort
Default is "Day of week / course start time"

Choose a sort order: Preferred/First name + Surname
Choose a day: day   Mon-Sun. Leave blank for all.
Print all Course Enrolments

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Tutor

Tutor Tier 4 have Course access to the admin data range OR the members data range NEW
Option – allow Tutor (access level 4) to view courses in Admin or Member date range (default)

Allow Tutors to see Admin date range in Course lookups: ☐ Untick for Member date range.

Admin Date Range Listing From:	01/01/2024
Admin Date Range Listing To:	31/12/2024
Member Date Range Listing From:	01/01/2023
Member Date Range Listing To:	31/12/2023

Email

Send Email - CC and personalisation NEW
Personalisation will not work for CC email addresses
Note added

CC (optional):

CC email address. Use semi-colon to separate email addresses.

Separate CC email addresses using semi-colons. Personalisation will not work for CC email addresses.

Send Email text editor insert image with space in file name
In the new text editor if inserting an image that has space/s in the file name the image will not be seen by gmail users
Fixed - spaces will be stripped before sending the email

Attachment Retrieve - reset a password Rev 3 7 December 2020.pdf found to send.
Checking for invalid characters in attachment...

The file name contained invalid characters and changed to: uploads/Retrieve-
resetapasswordRev37December2020.pdf

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Online payments - PayPal

Core PayPal payments not returning to U-MAS NEW

A tickbox has been added to the System Settings>Information>PayPal to enable/disable the PayPal gateway in Core

Paypal

Accept Paypal: ☑
Use Paypal Sandbox Testing: ☐ Not required
Paypal email: [redacted].org.au
Turn off Paypal in the Core UMAS Invoice: ☑

If ticked, when clicking on Pay Invoice the Invoice popup does not display the Submit button and the text has been replaced with "Please use UMAS for Members for all Paypal transactions"

$0.10 Pay Invoice   No   Edit

View UnPaid Invoice. Use UMAS4M for paypal and credit card payments.

Please sele

Paypal and bank transfer accepted for payment.

Paypal
Please use UMAS for Members for all Paypal transactions.

Bank transfer
Pay anyone:- Bank: Westpac BSB: 063 123 Account: 1234567890123456
Reference: 2108
The Reference number must be entered with your payment to ensure your subscription is processed correctly.
PO Box: PO Box 1157 Lalor, Vic, 3075

Tip: use U4M for all PayPal payments

Reports (1)

Reports>Enrolments and Attendance
Fixed. Sort Order

Print All Course Enrolments –
Fixed. Default order "day of week" and second sort "course start time"
Or, choose a day of week

Print All Attendance List – NEW
default "day of week" with second order course start time
New pulldown option to sort on

View or Select Courses>Rep
Fixed. Sorted in enrol date and time with Wait List at the bottom

Reports (2)

Reports/Enrolments/List enrolments not completed **NEW**
a Print button has been added

Enrolments not completed	Print

Report to list all payments **NEW**
Reports>Financials>List All Receipts for Non-PayPal and PayPpal
A new report to list all payments (Non PayPal and PayPal) in the one report

Dates between: dd/mm/yyyy and: dd/mm/yyyy

List All Receipts for Non-PayPal and Paypal

All Receipts from 10/03/2024 to 13/03/2024 — Print

Date	Member No	Name	Code	Type	Amount	Payment ID/Batch
11/03/2024	241▮▮	Patricia Cochrane	24SUBS	PayPal	65.00	02717108RJ994042V
12/03/2024	241▮▮	Lou Baldwin	24SUBS	EFT	65.00	20240312
12/03/2024	241▮▮	Elizabeth Hutton	24SUBS	PayPal	65.00	9PX60331J0273411M
13/03/2024	241▮▮	Pc Gaunter	24SUBS	Credit card	65.00	20240313

Paypal Total:					130.00	
Other Total:					130.00	
Total:					260.00	

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Miscellaneous (1)

7 Year Deletion
Fixed. Missed out being installed in 6.07

Return to Website [Return to Website]
Fixed - if select OK, logged out of U-MAS and taken to the website

Date from which member details are displayed needs to be day before
Workaround - mouse hover over Subs will show the actual enrol date (which may be different to the "Start Date")

19/01/2024	0:00	24SUBS	Subscription for 2024

The enrolment date is 19/02/2024

Miscellaneous (2)

Absence option to not send email to member in Core NEW

When admin reports an Absence on behalf of a member provide an option to not send email to the member

| Submit | Submit, with no email to member |

Core U-MAS Home screen updated

Welcome to the U3A Network Test Membership System

TUTORS AND ADMINISTRATORS CAN LOGIN HERE

You will need your Membership No. and Password to login.
Members or prospective members must use the 'U-MAS for Members' system.
Click on 'View Courses' to be redirected to U-MAS for Members.
If you need help contact us on (03) 1234 5678 or email st████████@gmail.com

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Upgrade Step 1

Login as Admin with member number and password

Membership number or email: [   ]
Password: [   ]
[Login]

Check the bottom ribbon on any page

- Confirm version number (the date may be different) -   Version: 6.07 27/10/2023

If you are currently not running Version 6.07 DO NOT PROCEED but contact your support person

Upgrade Step 2

If instructed to do an upgrade (to ensure you have the latest version):-
Run step 1 **Upgrade the programs**, then if instructed go to
Step 2. **Upgrade Database changes.**
Note: The Web server must have Zip enabled in the PHP settings, which is a default for most ISPs.

1. Upgrade program version: [1. Upgrade the programs] This will look for a zip file on the vendor's website and unzip it.

2. Upgrade Database changes: [2. Upgrade Database changes] This will update any database changes, based on the version.

- Miscellaneous>Upgrade
  - Select Upgrade the programs

    - Message similar to that on right will be displayed
    - Processing should only take a few seconds.
    - Look for Miscellaneous button at the end of the string before continuing to Step 3
    - Select Miscellaneous and proceed to Step 3

DYNAMIC UPDATE SYSTEM

Current version is 6.07. Looking for a new version: https://members.u3avictoria.com.au/UMAS-UPDATE-PACKAGES/Version.txt Please wait..

Version: 6.08
Looking for https://members.u3avictoria.com.au/UMAS-UPDATE-PACKAGES/MMD-CMS-6.08.zip
Temp File is /tmp/TmpmJgLaJ
Dir extract is: /home/u3aportf/public_html/members
Value of file_put_contents is: 880311
Value in extracting from a zip: 1
PHP with zip support exists. Continuing..
Unzipping /tmp/TmpmJgLaJ to /home/u3aportf/public_html/members Result is 1
Step 1. New files have been updated.
Now run step 2, after reloading from the Miscelleneous menu. If shown, cancel the popup.
Please check it is running ok.
Step 2. Upgrade any Database changes.
Note: **This Must be done.** Click on the button
2. Upgrade any Database changes
This will update the version number. Please check it is running ok
Return to Miscellaneous: [Miscellaneous]

If an error is received during this Step, refresh screen using F5 and, if necessary, try again

Step 3

- Miscellaneous>Upgrade
  - Select Upgrade the database changes

- Message similar to that on right will be displayed

- On completion the text at the bottom will be "Please select a menu option to check the system is ok"

If an error is received during this Step, refresh screen using F5 and, if necessary, try again

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U-MAS 6.08 System settings: add in a switch for the Tutors to see the Admin/Members date range of Courses.
System settings-information: Paypal: add in a switch for to make Paypal invisible in the core UMAS invoice .
Your current database version is 6.07 on 19/03/2024
Database update required.. New version is 6.08
This version is 6.07, so time to update to version 6.08 2024-03-19

This field added for sysfile.tutors_see_member_date_range
This field added for sysfile.remove_paypal_invoice
Please select a menu option and check the system is ok.

Checks to be done

- Core U-MAS
  - Confirm Version: 6.08 appears in the bottom ribbon of any page

    → | Version: 6.08 19/03/2024 |

- U-MAS for Members
  - Confirm Version: at the bottom of any page

    | U-MAS version: 6.08, release date: 19 Mar 2024. U-MAS for Members version: 1.6.20230315. |

- To do
  - Advise Send Email users of the new text editor changes
  - Insert new email in System Settings>Members>Courses Absence Email if you want these emails to be directed to a particular email (or leave blank)

- Check sample areas
  - Run through a few Menu items to check all is OK eg:
    Sample Courses
    Sample View Member Details
    Sample Edit Member Details

That's it – well done!