

# BEACON FOR GROUP LEADERS

## Introduction to Beacon

U3A Beacon is an on-line facility for managing U3A local associations, with particular emphasis on membership, finance and groups. It has been designed from the outset to be simple to use with links on the home page to the Beacon User's Guide and the U3A Beacon Users Forum - both helpful when problems arise. Beacon is secure - all U3As are co-hosted on the same server, with security arrangements isolating the data of each U3A from that of all others. Beacon helps us ensure that our U3A is effectively managed to the benefit of all our members. In particular it facilitates:

- Emailing group members with e.g. travel arrangements, programme updates, menus, guidance notes, bridge scores etc. · Contingency planning - a temporary leader can be nominated in the event of illness to ensure groups are kept informed.
- Waiting List management - for groups with limited capacity e.g. Yoga and Cycling
- Emergency contact details (if they have been recorded) can be retrieved for group members using a smartphone

Beacon is not one-size-fits-all; its authors have tried to accommodate many different ways of working. But sometimes it will make sense to just go with administrative solutions that work best for most. We need to remember that Beacon will probably be our core U3A admin system for many years to come - as we look at things that need fixing, things that need changing, and things that would be-nice-to have as feature enhancements, we should bear this in mind.

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## Logging in for System Users

Beacon is accessed via your web browser on computer, tablet or smart phone at <https://u3abeacon.org.uk>. Simply enter your U3A name (Southport in our case), Username and Password. These are allocated by your U3A site administrator, ([admin@SouthportU3A.org.uk](mailto:admin@SouthportU3A.org.uk)) who can also assist if you forget your password which is case sensitive and must contain upper and lower case letters and numeral e.g. glasGOW4fr.

## Roles and privileges

Each system user will have been given a set of defined roles and privileges which control the level of access they have to data e.g. Group Leaders will be able to see and print out names, addresses, phone numbers and emergency contact details for members of their group together with emergency contact information. They will be able to add and remove members from their groups but cannot edit group members' personal data.



## Groups

Clicking on the Groups link on the Administration screen (above) brings you to the Groups page showing current, although not necessarily active, groups in your U3A. The left hand column of this table allows you to select all or any of the groups, using tick boxes, and download/print data as an Excel table. The tick boxes also let you email selected or all group leaders who have email. To select all click on Select on the header row of the table. Scroll to foot of the table to pick what you wish to do with them.

The screenshot shows the '#Groups' page with a blue header. It includes a 'Faculty' dropdown set to 'Study Groups' and a 'Show active only' checkbox. Below the header is a table with columns: Select, #Group, Active, When, Where, #Leaders, Members, Max, and Waiting. The table lists various groups like 'Bible Study', 'Computing - Tablets', 'Computing For Beginners', 'Family History', 'Geography', 'History', 'Railways and Canals', 'Rivers of the World', and 'Social Studies'. At the bottom, there are buttons for 'Do with selected' and 'Send E-mail to #leaders'.

Select	#Group	Active	When	Where	#Leaders	Members	Max	Waiting
<input checked="" type="checkbox"/>	Bible Study	Y	3rd Sunday at 2:30pm	Friends Meeting House	Albert Atheist	1		
<input type="checkbox"/>	Computing - Tablets	Y	3rd Monday at 2:00pm	Library	David Barrett	1		
<input type="checkbox"/>	Computing For Beginners	Y	1st Weds and 3rd Thurs at midday	Library	Brian Aardbatt	6		
<input type="checkbox"/>	Ano Driver				Ano Driver			
<input type="checkbox"/>	Family History	Y	2nd and 4th Mondays at 2:00pm	The Feelgood Centre	John Black	1		
<input type="checkbox"/>	Geography	Y	1st Tuesday at 10:00am	Private House	Fred Flatiron	1	8	
<input type="checkbox"/>	History	Y	2nd Monday at 2:00pm	Corn Exchange	Daisy Flower	1		
<input type="checkbox"/>	Railways and Canals	Y	1st Monday at 2:00pm	Private House	Johnny Mason	1	10	
<input type="checkbox"/>	Rivers of the World	Y	1st Thursday at 2:00pm	Private House	Denise Moody	1	10	
<input type="checkbox"/>	Social Studies	Y	3rd Thursday at 10:00am	Private House	Caroline Sawers	1	9	

## Details

The Details page is where you will enter details about your group - where, when and how often it meets, maximum numbers if applicable and other useful information.

Fill in as much information as you see fit but you can of course come back and edit and expand this data at any stage. Start and end times are set by using sliders but they can also be typed in.

The screenshot shows the '#Group Record for Computing For Beginners' page. It has tabs for 'Details', 'Schedule', 'Members', and 'Leder'. The 'Details' tab is active, showing a form for '#Group Details'. The form includes fields for #Group (Computing For Beginners), Faculty (Study Groups), Status (Active), Max members, and checkboxes for 'Allow members to join on-line', 'Enable waiting list', and 'Notify #leader of changes'. It also has fields for 'When' (1st Weds and 3rd Thurs at midday), 'Normal start time' (12:00), 'End time' (15:00), and 'Contact' (Ano on 0707 456 1077). There is a 'Venue' dropdown set to 'Library' and an 'Information' text area containing 'First catch your mouse!'. At the bottom, there is a 'Notes' field and a 'Save Record' button.

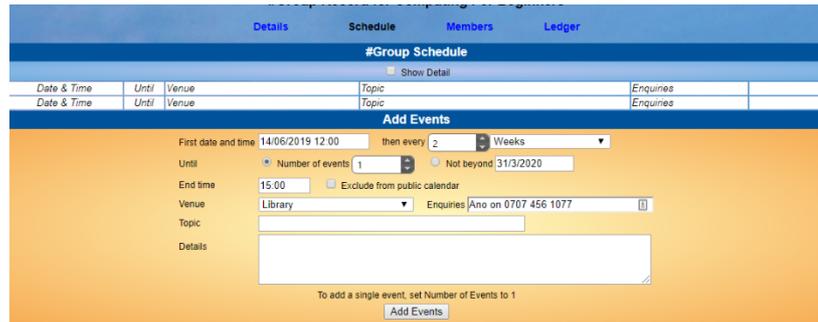
## Schedule

The Schedule page helps you to create and publicise your programme of events - it can be viewed by group members and visitors to U3A's web page reducing the need for one

individual to gather and disseminate information about group activities - sharing and lightening the load.

The Add Events section at the bottom of the screen helps you populate the schedule and give details of events.

Much of this information is used to populate the U3A calendar



## Group Members

The **Members** page is where members are added to and removed from groups. It prompts you if members have not renewed their membership - names will appear in red. It also allows you (in the right hand **make leader** column) to "promote" a member of the group to a leadership role, perhaps to handle communications - the system administrator will supply a user name and give them the necessary privileges.



Adding new members is simple - just enter their membership numbers - don't forget to click Add wherever you see it!

When applicants to the group exceed the maximum allowed this page will handle the waiting list, recording when their names were added.

Clicking in the tick boxes in the left hand **Select** column allows you to send emails to all or any of your group with email, download contact details for members and remove members. When you have selected the required action click on **Do with selected** to execute the task.



## Email

If you have selected Email. A window comes up in which you can create a mail message. On the right-hand side you see some 'tokens' which will populate the message with details from each member record.

It is possible to attach files, or links to files as required.

Each email is sent separately to each recipient so there are no privacy considerations to worry about.

The window does time-out so for long or complex messages it may often be advisable to create the message outside of Beacon and Copy / Paste into the window.

## Group Finances

There is a Group Ledger which can be used to keep a trail of the group's financial movements. This is not connected to the Treasurers accounts and can be used by the group leader as required.

**#Group Record for Computing For Beginners**

Details    Schedule    Members    Ledger

**#Group Ledger**

From 1/4/2019 to 31/3/2020

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£ 0.00	
14 Jun 2019	Museum Trip	Coach		£ 500.00	£ - 500.00	edit - delete
14 Jun 2019	Museum Trip	Fred Blogs	£ 25.00		£ - 475.00	edit - delete
15 Jun 2019	Museum Trip	Bert Jones (And Dora)	£ 50.00		£ - 425.00	edit - delete
16 Jun 2019	Museum Trip	Donny Trump	£ 25.00		£ - 400.00	edit - delete
Date	Payee	Detail	In	Out	Balance	

**Add transaction**

Date	Payee	Detail	In	Out
14/06/2019				

Save