

BEACON FOR GROUP LEADERS

Introduction to Beacon

u3a Beacon is an on-line facility for managing u3a's 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. meeting times, travel arrangements, programme updates, guidance notes 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. Architecture
- 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 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.

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 (Bradford on Avon & District in our case), Username and Password.

These are allocated by your u3a site administrator, Sally Ashton (boau3a@gmail.com) who can also assist if you forget your password. Passwords are case sensitive and must contain upper and lower case letters and numeral e.g. glasGOW4fr.

SEP

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. You will be able to add and remove members from your groups but cannot edit group members' personal data. Please contact the membership secretary if a members personal details have changed.



Groups

The screenshot shows the '#Groups' page with a blue header. Below the header, it says 'Faculty: Study Groups' and 'Show active only'. There is an information icon and the text 'Operations at bottom of page'. Below that is an alphabetical index 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. The main content is a table with the following columns: Select, #Group, Active, When, Where, #Leaders, Members, Max, and Waiting. The table lists several groups, some with expandable arrows and some with checkboxes. At the bottom, there is a 'Do with selected' dropdown and 'Send E-mail to #Leaders' button. A status bar at the very bottom says '9 groups: 10 leaders (0 selected)'.

Select	#Group	Active	When	Where	#Leaders	Members	Max	Waiting
▲▼	B							
<input type="checkbox"/>	Bible Study	Y	3rd Sunday at 2:30pm	Friends Meeting House	Albert Atheist	1		
▲▼	C							
<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 Ano Driver	6		
▲▼	F							
<input type="checkbox"/>	Family History	Y	2nd and 4th Mondays at 2:00pm	The Feelgood Centre	John Black	1		
▲▼	G							
<input type="checkbox"/>	Geography	Y	1st Tuesday at 10:00am	Private House	Fred Flatiron	1	8	
▲▼	H							
<input type="checkbox"/>	History	Y	2nd Monday at 2:00pm	Corn Exchange	Daisy Flower	1		
▲▼	R							
<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	
▲▼	S							
<input type="checkbox"/>	Social Studies	Y	3rd Thursday at 10:00am	Private House	Caroline Sowers	1	9	

Clicking on the Groups link on the Administration screen brings you to the Groups Page showing current, although not necessarily active groups in our u3a. Your group name will be in BLUE. You can access your group by clicking on the name. You cannot access groups coloured GREY.

You cannot access your group by ticking the box.

Details

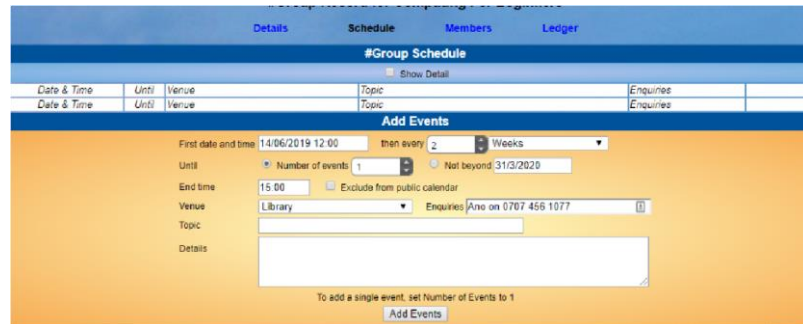
The Details page is where you will enter details about your group - where, when and how often it meets, maximum numbers if applicable and other useful information.

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 with a blue header. Below the header, there are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The main content area has a yellow background and contains the following fields: '#Group' (Computing For Beginners), 'Faculty' (Study Groups), 'Status' (Active), 'Max members' (input field), 'When' (1st Weds and 3rd Thurs at midday), 'Normal start time' (12:00), 'End time' (15:00), 'Contact' (Ano on 0707 456 1077), 'Venue' (Library), 'Information' (First catch your mouse!), and 'Notes' (input field). At the bottom, there is a 'Save Record' button and a status bar that says '#Group record created 11 Jun 2019 13:29; last changed 11 Jun 2019 13:29'.

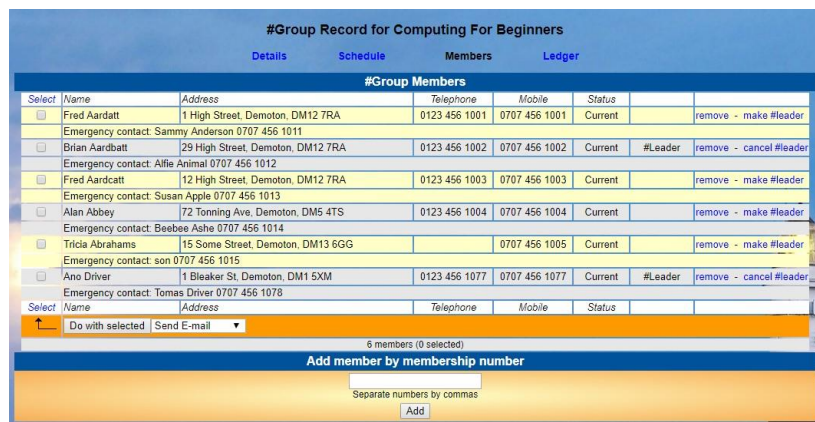
Schedule

The Schedule page helps you to create and publicise your programme of events but this is for future development in our u3a. All members of our u3a would need access to Beacon which is something we hope to achieve in the future.



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 or find their name - 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.



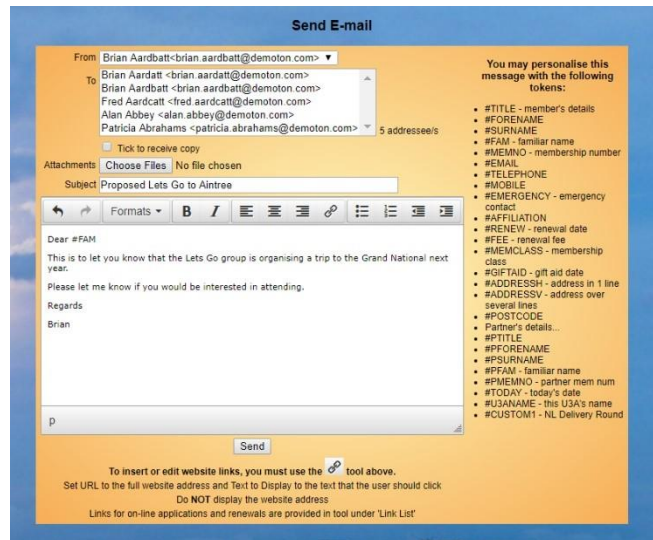
Email

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 as BCC 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 track 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 Triup	Coach		£ 500.00	£ - 500.00	edit - delete
14 Jun 2019	Museum Triup	Fred Blogs	£ 25.00		£ - 475.00	edit - delete
15 Jun 2019	Museum Triup	Bert Jones (And Dora)	£ 50.00		£ - 425.00	edit - delete
16 Jun 2019	Museum Triup	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

When you have finished using Beacon please don't forget to LOG OUT on the home page.