



**South Woodham Ferrers U3A
Beacon User Guide for Groups
2022**

This guide specifically aimed at groups, is intended to help Group Leaders gain a brief insight into what Beacon is, and how it might help them better manage their groups on a secure common platform. It then goes on to assist with the setting up of groups within Beacon, how to send group emails and how to make use of group ledgers.

Bob Tyas Feb 2022

Introduction

U3A Beacon is an on-line facility for managing U3A local associations, with particular emphasis on Membership, Finance and Groups. Beacon is secure – all U3As are co-hosted on the same server, with security arrangements isolating data of each U3A from that of all others. It helps us ensure that our U3A is effectively managed, to the benefit of all our members. In particular for groups, it facilitates:

- Emailing group members
- Contingency planning – temporary leader can be nominated in case of illness
- Waiting List management – for groups with limited capacity
- Emergency contact details (if they have been recorded) can be retrieved using a smartphone
- Financial Management

Logging In

You access beacon via your web browser on a computer, laptop, tablet or smartphone at <https://u3abeacon.org.uk>. Then enter your u3a name using a dropdown, followed by your username and password, which are allocated by your site administrator Kay Miles (kaysusan6970miles@gmail.com) who can assist if you forget your password. Passwords are case sensitive and must contain upper and lower case, letters and numerals.



u3a
Beacon

South Woodham Ferrers

Administration

U3A

Username

Password

Passwords are case sensitive

Beacon Login Page

Logging In for the First Time

You will be sent your username and a temporary password by your administrator. When you login for the first time you will be asked to change your temporary password and add an easy to remember security question such as the name of your first school. Once this has been entered the Beacon Admin page will open.



Beacon Admin Page

Roles and Privileges

As a user you are given a defined role and a set of privileges which controls the level of access you have, these will have been set up by your Administrator. For example, as a Group Leader you will be able to see and print out names, phone numbers and emergency contact information for your group. You will also be able to add and remove members from your group, however, you will not be able to edit members personal data.

Setting Up Groups and Adding Members

You will notice that you only have access to **Groups** and **Misc.**, on the **Administration** page, and please note that anything in blue is clickable. To start setting up your group click on **Groups**. This will take you to the following page which shows the groups that are in the system thus far. Some are set up with members having been allocated to them, others are waiting for certain actions to be taken. Notice that for your group you will have been set up as the leader.

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲ ▼	F							
<input type="checkbox"/>	Find Your Voice	Y			Shirley Masterson	1		
▲ ▼	G							
<input type="checkbox"/>	Gin Appreciation	Y			Mary Brindley	1		
▲ ▼	L							
<input type="checkbox"/>	London Walks	Y			Mary Brindley	1		
▲ ▼	P							
<input type="checkbox"/>	Paint & Pastels	Y			Chris Miles	1		
<input type="checkbox"/>	Pics and Bricks	Y	4th Tuesday of the month		Chris Miles	49		
▲ ▼	W							
<input type="checkbox"/>	Walking Group	Y	Group meets 1st and 3rd Friday of the month		Bob Tyas	26		
<input type="checkbox"/>	Wine Appreciation 3	Y			Shelia Chilton	1		
Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
⬅	Do with selected	Send E-mail to leaders ▼						
7 groups; 7 leaders (0 selected)								

Groups Page

It is your Beacon Administrator who add new groups and list you as the Group Leader. You only have access to your group and cannot view those of other group leaders.

Now click on your group, which is shown in the lefthand column and should be highlighted in blue. This opens the **Group Record** page which defaults to group **Details**. Here you can add the following information:

- Maximum group number if there is a limit
- Enable a waiting list if appropriate
- Give information about when you meet and give start/finish times
- Add a contact or contact number
- Give general information about the group
- etc

The example shown below is for the Walking Group and illustrates the sort of information you might want to add about your group. Members are able to view this information through **Public Links**, however, we are not at a point where we want to make this available at the current time.

Group Record for Walking Group

Details Schedule Members Ledger

Group Details

Group: Walking Group

Faculty: [dropdown] Status: Active Max members: [input]

Allow members to join on-line Enable waiting list Notify leader of changes

When: Group meets 1st and 3rd Friday of the month

Normal start time: 10:00 End time: 12:00 Contact: 07889949685

Venue: [dropdown]

Information: The group meet on the 1st and 3rd Friday of the month and most of our walks are between 5 and 7 miles in length, with most walks within a 10 mile radius of South Woodham. We walk at quite a steady pace with few stops. The terrain and weather conditions can vary so walking boots and appropriate clothing are essential

Notes: [input]

Group record created 8 Nov 2021 11:46; last changed 8 Nov 2021 11:46

Save Record

Group Details Page for Walking

What follows is a hypothetical group used to demonstrate how to add members.

Group Record for Crosswords and Quizzes

Details Schedule Members Ledger

Group Members

Select	Member No.	Name	Telephone	Mobile	Status		
<input type="checkbox"/>	66	Bob Tyas	01245 321110		Current	Leader	remove - cancel leader
Select	Member No.	Name	Telephone	Mobile	Status		

Do with selected Send E-mail [dropdown]

1 members (0 selected)

Add member by name

- select member - [dropdown] Add

Add member by membership number

[input]

Separate numbers by commas

Add

Group Members Page

Once you have added your groups details, select **Members** and you will see something similar to the above, but for your group. To add members to your group, click the **select members** dropdown under the heading, **Add members by name**. Once you locate and select a member, click **Add**. That members details will now appear in your member’s record. Repeat this operation until all members have been added. The example below shows the hypothetical group with several members having been added.

Group Record for Crosswords and Quizes

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Members							
Select	Member No.	Name	Telephone	Mobile	Status		
<input type="checkbox"/>	191	Mary Brindley	01245 329162		Current		remove - make leader
<input type="checkbox"/>	446	Shirley Masterson	01621 740110	07956799989	Current		remove - make leader
<input type="checkbox"/>	614	Ian Mathews		07421776829	Current		remove - make leader
<input type="checkbox"/>	66	Bob Tyas	01245 321110		Current	Leader	remove - cancel leader
Select	Member No.	Name	Telephone	Mobile	Status		
<input type="checkbox"/> Do with selected Send E-mail v							
4 members (0 selected)							

Add member by name

- select member - v Add

Add member by membership number

Separate numbers by commas
 Add

Hypothetical Group with Added Members

Note Regarding Leaving/Renewing Members

If the status of a member changed, for example, the member leaves our u3a for whatever reason, their membership of the group will not change. Beacon will not automatically remove them from the group list, or flag them in any way. You will only know when the Membership Secretary informs you of a members change of status. This is a known weakness of Beacon and will hopefully be address some time in the future.

At the start of the new membership year, the names of members of groups who have not renewed will appear in red and will remain in red until they renew.

Sending E-mails

One of the big advantages of using Beacon is the ease with which you can securely send e-mails to your group members without the need to worry about blind copies. This is covered in the next section.

In the **members** list select those members you wish to email by clicking the appropriate tick boxes in the lefthand, **Select** column, and then click, **Do with selected** which you will see is **Send E-mail**. This will raise the email to which you can add your message. The system allows you to browse your computer so that you can add attachments.

<input checked="" type="checkbox"/>	511	Russ Walker	01245 321556	07846 109283	Current		remove - make leader
<input checked="" type="checkbox"/>	412	Jean West	01245 322599	7745002579	Current		remove - make leader
<input checked="" type="checkbox"/>	466	Phil West	01245 322599	07751022666	Current		remove - make leader
<input checked="" type="checkbox"/>	506	Mary Whyte	01245 224744		Current		remove - make leader
<input checked="" type="checkbox"/>	478	Ann Woolley		07956 918521	Current		remove - make leader
<input checked="" type="checkbox"/>	597	Mark Woolley		07956918508	Current		remove - make leader
Select	Member No.	Name	Telephone	Mobile	Status		
	Do with selected		Send E-mail <input type="button" value="v"/>				

Several Members have been Selected to Receive an E-mail

If you wish to select all members, go to the top of the select column and click **Select** and follow the instructions, see below.

Group Members							
Select	Member No.	Name	Telephone	Mobile	Status		
<input checked="" type="checkbox"/>		Mark Brice	01245 329498		Current		remove - make leader
<input checked="" type="checkbox"/>		Mary Brindley	01245 329162		Current		remove - make leader
<input checked="" type="checkbox"/>		Mike Burton	01245 325557		Current		remove - make leader
<input checked="" type="checkbox"/>		Maine Coggan	01245 322193	01245 322193	Current		remove - make leader
<input checked="" type="checkbox"/>		Angel Coggan	01245 322193		Current		remove - make leader
<input type="checkbox"/>	406	Christine Conway	01245 322669		Current		remove - make leader

Selection All Members

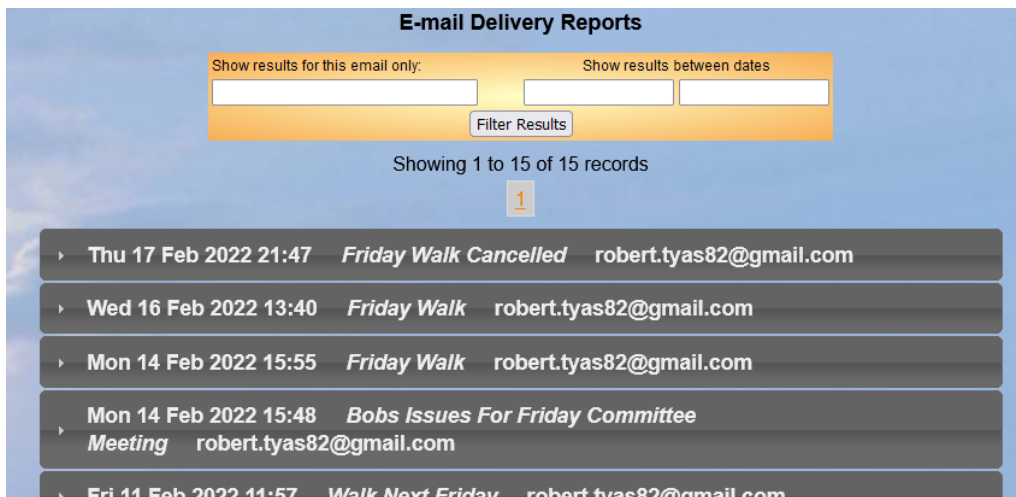
E-mail Format with Addresses Blanked Out

E-mail Delivery

If you go back to the **Administration or home page** you will notice you can click on an instruction “E-mail delivery”. See below.



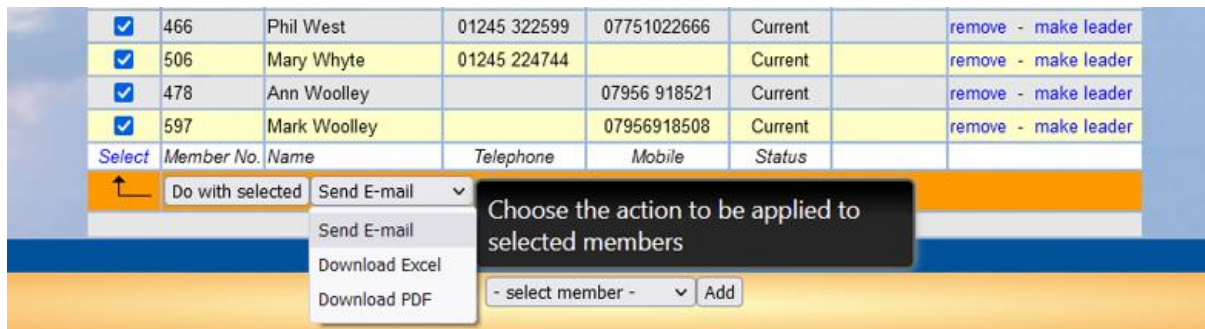
This opens-up something like that shown below and enables you to check what e-mails you have sent and who received them.



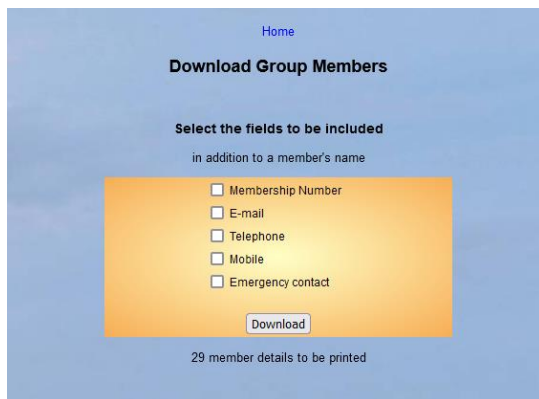
For example, if you were to click on Thursday 17 Feb, you will see names of the recipient.

Group Lists

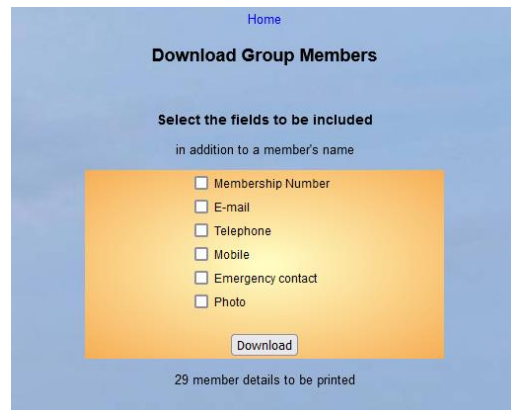
In addition to sending e-mails, you can print a list of members and include various information such as telephone numbers, in either Excel or PDF format. Once you have selected your members in the left-hand column, click the **Send E-mail** dropdown to reveal the following:



Select the format you want and click the **Do with select**. Next select the information you want to include against the names of your members, then click the **Download box**. See below for options.



Excel Options



PDF Options

The list can then be printed and saved to your PC or laptop for use again at a later date. With careful selection and editing a list could very easily be used as an attendance sheet.

Group Ledger

If you go back to your **Group Records** page you will notice that you can select the group **Ledger**. This page is used to record your groups financial transactions, for example, contributions from group members, purchase of equipment, room hire, etc. It is essentially a simple cash book recording money in and out giving a degree of control and accountability for your financial transactions.

The example shown below is a hypothetical one for the walking group and shows two entries for the purchase of a map and first aid kit. It not a good example as it shows the group in deficit. The date, payee and details of the transactions are entered as an in or out transaction which when saved are entered into the main body of the ledger. It is then possible to download an Exel version which at the end of the financial year can be forwarded to your treasurer.

Group Record for Walking Group						
Details		Schedule		Members		Ledger
Group Ledger						
From 1/4/2021 to 31/3/2022						
Date	Payee	Detail	In	Out	Balance	
		Brought forward			£0.00	
29 Dec 2021	WHSmith	Ordinance Servey Map		£7.50	£-7.50	edit - delete
29 Dec 2021	Go Outdoors	First Aid Kit		£15.00	£-22.50	edit - delete
Date	Payee	Detail	In	Out	Balance	
Download Excel						
Add transaction						
Date	Payee	Detail	In	Out		
29/12/2021						
Save						

Group Ledger

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	A	B	C	D	E	F	G	H	I
1	South Woodham Ferrers U3A Walking Group Ledger								
2	1/4/2021 - 31/3/2022								
3									
4	Date	Payee	Detail	In	Out	Balance			
5			Brought forward			0			
6	29/12/21	WHSmith	Ordinance Servey Map		7.50	-7.50			
7	29/12/21	Go Outdoors	First Aid Kit		15.00	-22.50			
8									
9									
10									

Excel Spreadsheet Version