



# Beacon User Guide for Bicester u3a Group Leaders

This guide is for the use of Bicester u3a Group Leaders who are new to the Beacon database system.

Every screenshot is shown as you will see it when you log into Beacon, using the Username and Password sent to you by the Bicester u3a Beacon System Administrator.

To go to the Beacon logon screen, click here [U3A Administration \(u3abeacon.org.uk\)](http://u3abeacon.org.uk) or enter the web address into your Browser

**Please note:** Members' personal details have been blanked out to comply with Data Protection Regulations.

*If you have any queries, please contact Bicester u3a Beacon Administrator at:*

[Beacon@u3aBicester.online](mailto:Beacon@u3aBicester.online)

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- Login Screen - Page 3
- Adding Members – Page 11
- Sending Emails – Page 12

## LOGIN SCREEN

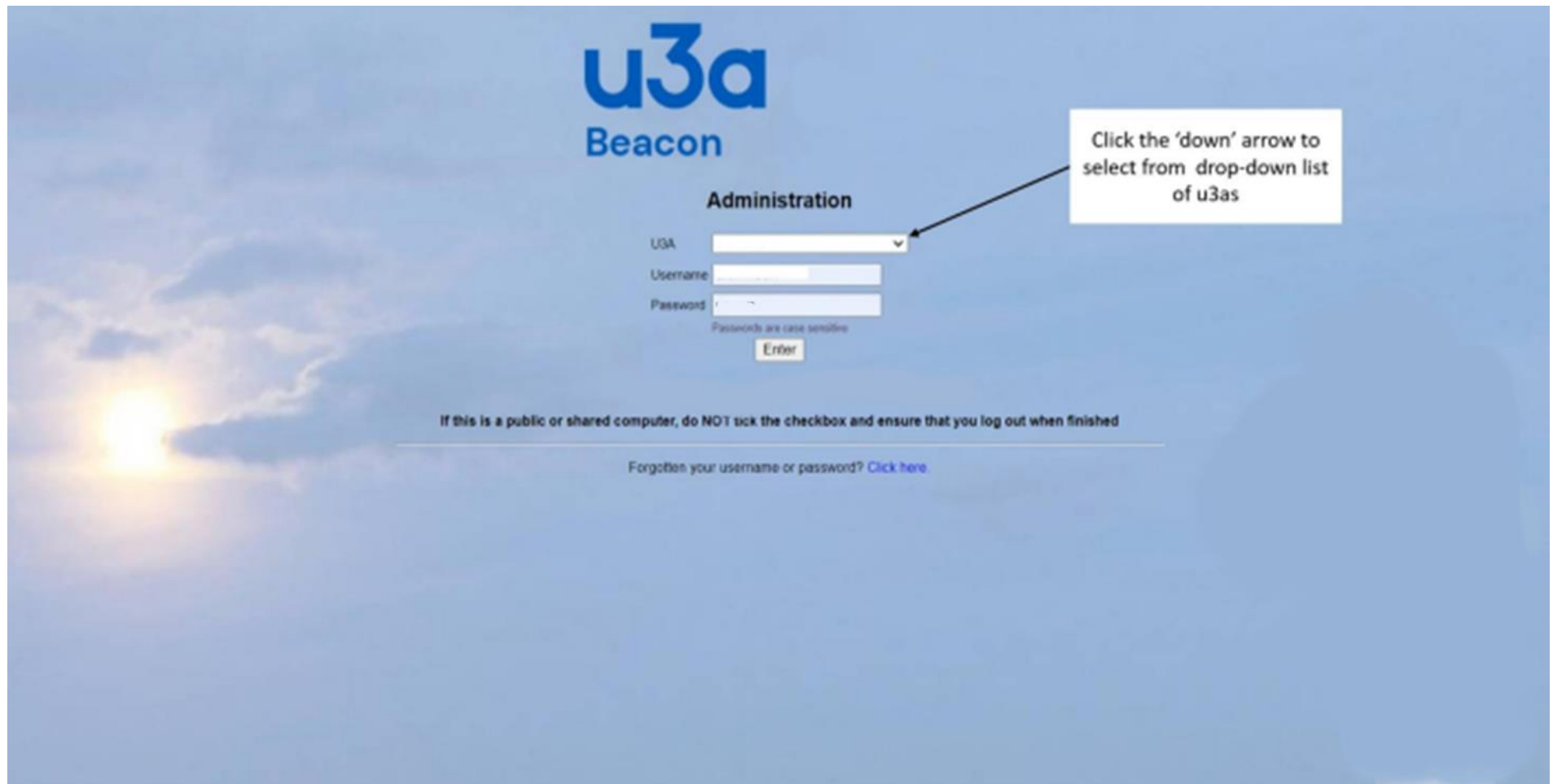


Figure 1.

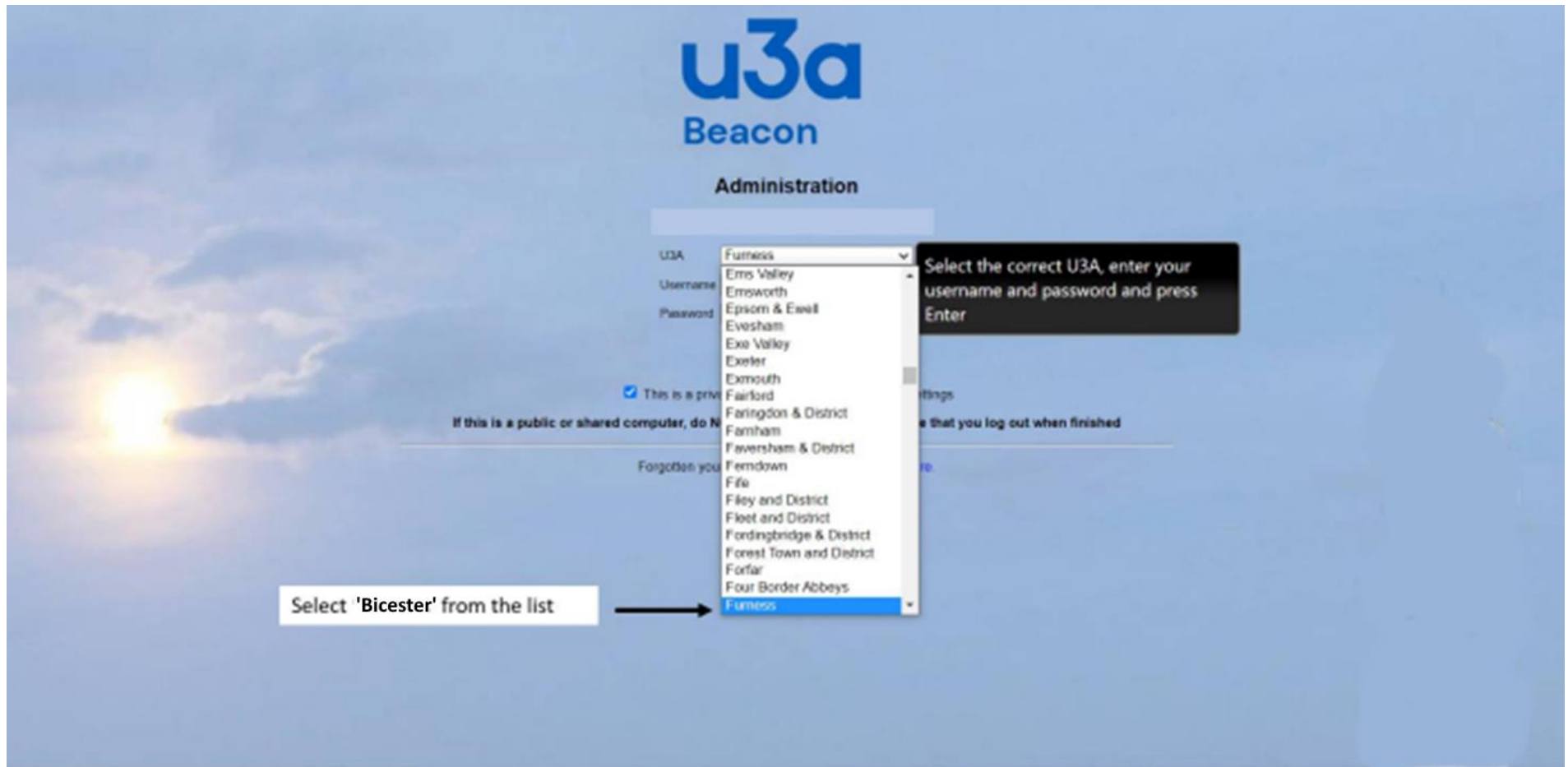


Figure 2.

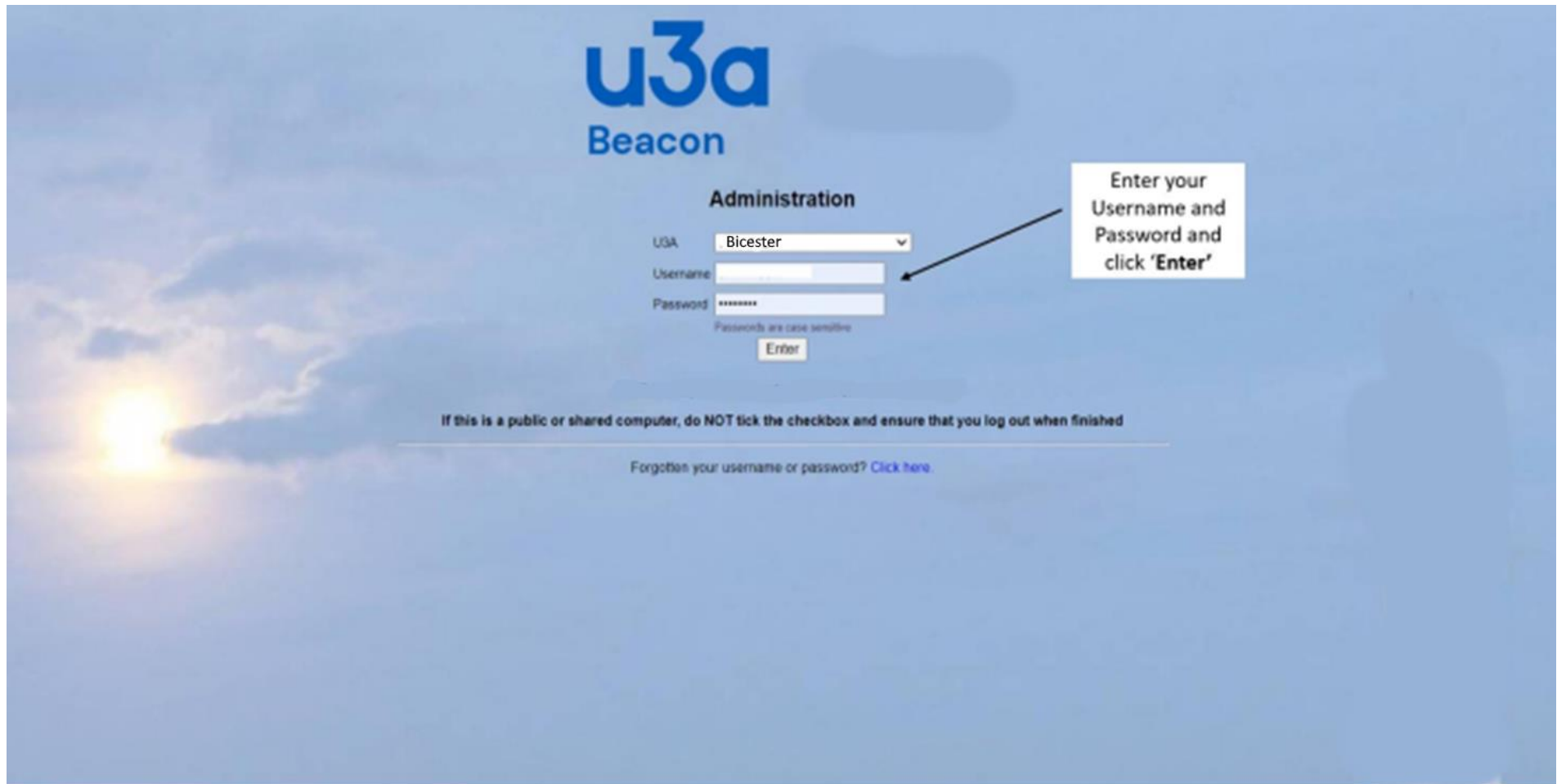
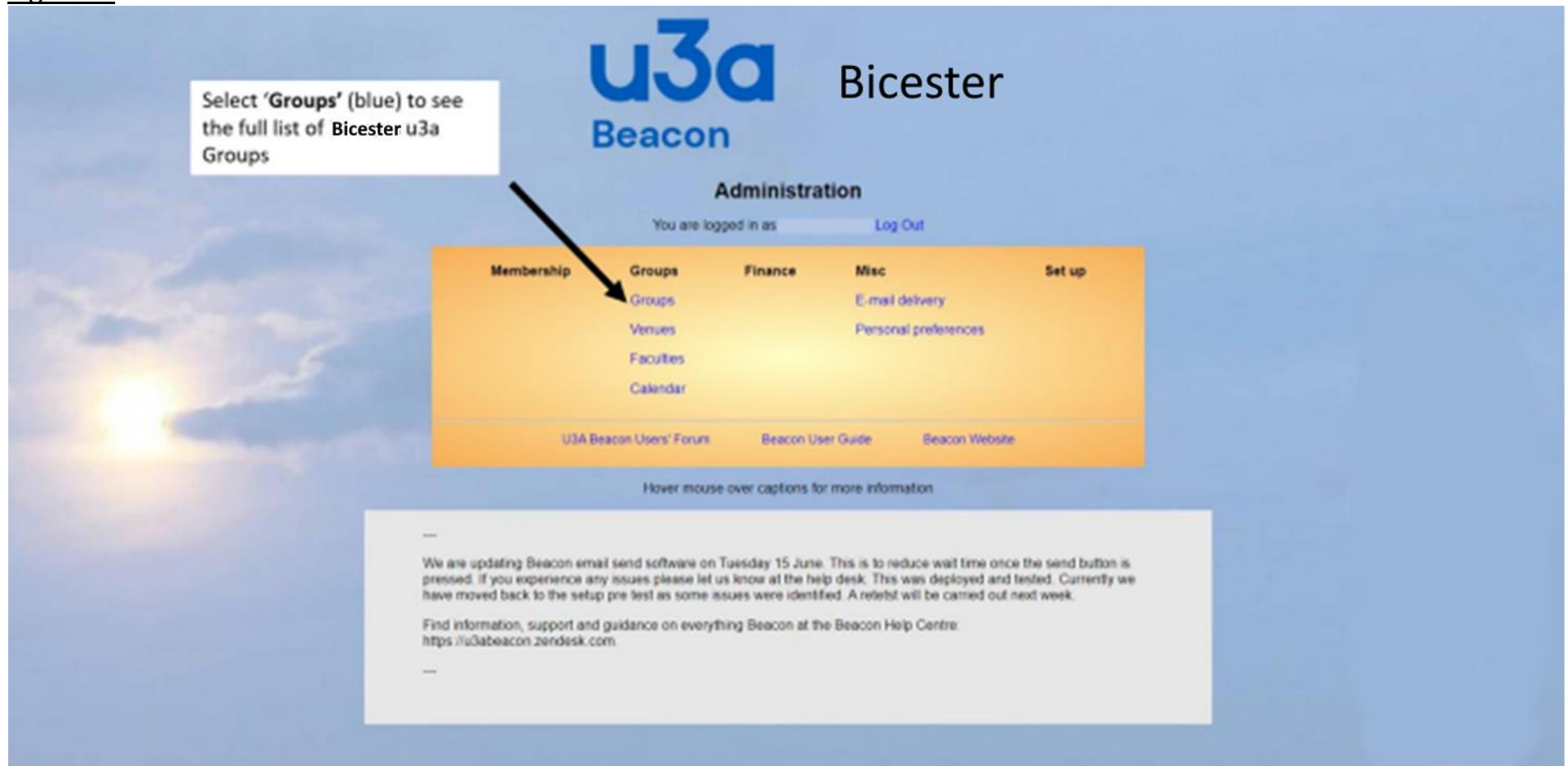


Figure 3.

Figure 4.



- You will now see the list of Groups run by Bicester u3a, but you need to scroll down to see them all

u3a Beacon Bicester

Home

Groups

Faculty: - any or none - Show active only

Operations at bottom of page

Click on letter to jump to a Group name beginning with it

Use this arrow to jump to the bottom of the list

Use the scroll bar to move down the list slowly

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
<b>A ▼</b>	<b>A</b>							
<input type="checkbox"/>	A Good Read	Y	4th Wed 10:30 am	Methodist Hall Meeting Rooms	M	11		
<input type="checkbox"/>	Art & Mixed Media	Y	1st Tues am	Coronation Hall, Arts-Room	E	4		
<b>B ▼</b>	<b>B</b>							
<input type="checkbox"/>	Bird Watching	Y	1st Wed am			24	26	
<input type="checkbox"/>	Book Reviewers	Y	1st Wed pm		C	5		
<input type="checkbox"/>	Bookworms	Y	1st Mon pm	Banow Central Library	M	10	12	
<input type="checkbox"/>	Bridge	Y	Mon 10am-1pm		S	11		
<b>C ▼</b>	<b>C</b>							
<input type="checkbox"/>	Casual Strollers	Y	Fridays		M	45	40	
<input type="checkbox"/>	Come Sing	Y	2nd Wednesday of the month		J	22		
<input type="checkbox"/>	Craft	Y	2nd Wed am	Drill Hall, Debus-in-Furness	F	12	14	
<input type="checkbox"/>	Craft2	Y	1st Tuesday pm	Quaker Barn	J	11		
<input type="checkbox"/>	Croquet	Y	1st Wednesday of the month		S	21	16	3

A list of Group Leader names is shown in this column

Figure 5.

- You will only be able to access the Group(s) you lead. The rest will be greyed out. •
- Click on your Group name (in blue)

## Beacon User Guide for Bicester u3a Group Leaders

A list of Group Leader names is shown in this column

Select	Group	Active	When	Where	Leaders	Members/Max Waiting
<input type="checkbox"/>	Theatre O.L. of Bunsellsands	Y	26th March 2020			39 45
<input type="checkbox"/>	Theatregoers	Y				98
<input type="checkbox"/>	U					
<input type="checkbox"/>	Uke Troupe	Y	2nd, 4th & 5th Mondays	Swarthmoor Reading Room		22 26
<input type="checkbox"/>	V					
<input type="checkbox"/>	Visiting Gardens	Y	3rd Tuesday at 10am			55
<input type="checkbox"/>	W					
<input type="checkbox"/>	Wednesday Walkers	Y	Wednesdays			56
<input type="checkbox"/>	World History	Y	1st Tuesday am	Coronation Hall, Arle Room		14
<input type="checkbox"/>	Write a Memory	Y	4th Monday pm			5

66 groups; 99 leaders (0 selected)

Select operation to be performed in the drop-down list above.  
 select the groups/leaders on whom to perform the operation with the checkboxes on the left (click on Select column header for preset selections menu), then press 'Do with selected'.

Click on your Group to see Group record

Home

Use this arrow to jump to the top of the list

Figure 6.



- This takes you to the first screen for your Group

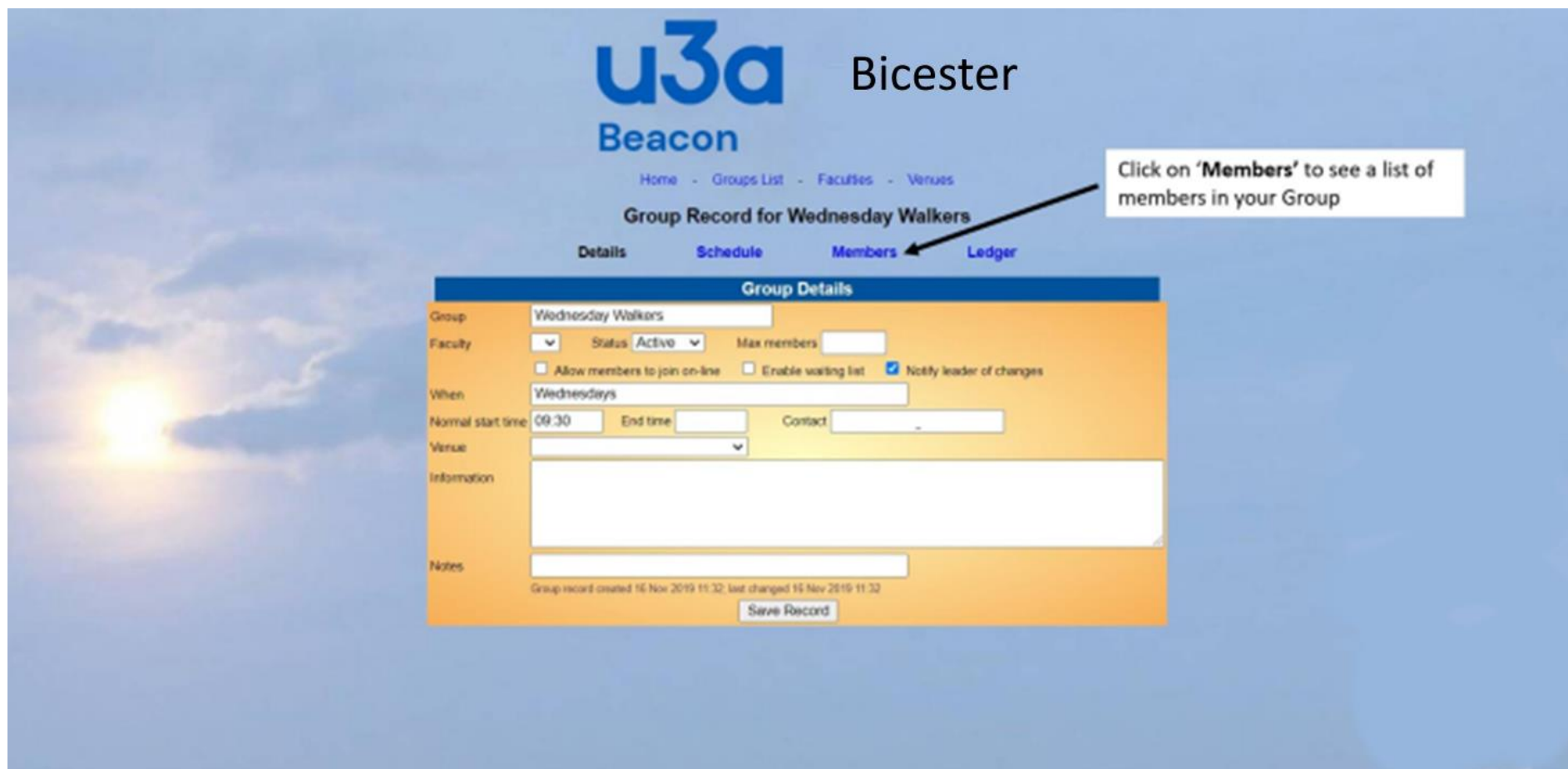


Figure 7

- The next screen you will see has the details of all the members in your Group (\*Only top half of

screen showing for a large group)

u3a Beacon Bicester

Home - Groups List

Group Record for Wednesday Walkers

Details Schedule Members Ledger

Select	Member No.	Name	Address	Telephone	Mobile	Status	
<input type="checkbox"/>	286					Current	remove - make leader
<input type="checkbox"/>	975					Current	remove - make leader
<input type="checkbox"/>	1437					Current	remove - make leader
<input type="checkbox"/>	275					Current	remove - make leader
<input type="checkbox"/>	754					Current	remove - make leader
<input type="checkbox"/>	120					Current	remove - make leader
<input type="checkbox"/>	1430					Current	remove - make leader
<input type="checkbox"/>	844					Current	remove - make leader
<input type="checkbox"/>	1166					Current	remove - make leader
<input type="checkbox"/>	357					Current	remove - make leader
<input type="checkbox"/>	358					Current	remove - make leader
<input type="checkbox"/>	1263					Current	remove - make leader
<input type="checkbox"/>	1236					Current	remove - make leader
<input type="checkbox"/>	851					Current	remove - make leader
<input type="checkbox"/>	380					Current	remove - make leader
<input type="checkbox"/>	379					Current	remove - make leader
<input type="checkbox"/>	1222					Current	remove - make leader

Member details are shown in these columns

Use this arrow to jump to the bottom of the list for more actions

Figure 8.

**ADDING MEMBERS** - Go to the bottom of the screen to **Add Member by membership number**



Select	Member No.	Name	Address	Telephone	Mobile	Status	Leader
<input type="checkbox"/>	1355					Current	remove - make leader
<input type="checkbox"/>	47					Current	remove - make leader
<input type="checkbox"/>	562					Current	remove - make leader
<input type="checkbox"/>	1482					Current	remove - make leader
<input type="checkbox"/>	997					Current	remove - make leader
<input type="checkbox"/>	1460					Current	remove - make leader
<input type="checkbox"/>	1089					Current	remove - make leader
<input type="checkbox"/>	1027					Current	remove - make leader
<input type="checkbox"/>	424					Current	remove - make leader
<input type="checkbox"/>	404					Current	remove - make leader
<input type="checkbox"/>	972					Current	remove - make leader
<input type="checkbox"/>	326					Current	remove - make leader
<input type="checkbox"/>	992					Current	remove - make leader
<input type="checkbox"/>	544					Current	remove - make leader
<input type="checkbox"/>	689					Current	Leader remove - cancel leader

Member details are shown in these columns

Do with selected | Send E-mail

58 members (0 selected)

**Add member by name**

- select member - | Add

**Add member by membership number**

Separate numbers by commas | Add

Home - Groups List

Figure 9.

**SENDING EMAILS** – Go to the list of Members in your Group (Figure 7.)



Figure 11.

- In order to choose 'Select All', you will need to click on 'Select' (blue) at the bottom left of the screen to reveal the black drop-down list

- This screen shows every Member selected, but you can select specific members manually if you want to limit the number of email recipients

A list of Member details is shown in these columns

Select	Member No	Name	Address	Telephone	Mobile	Status	
<input checked="" type="checkbox"/>	333					Current	remove - make leader
<input checked="" type="checkbox"/>	1355					Current	remove - make leader
<input checked="" type="checkbox"/>	47					Current	remove - make leader
<input checked="" type="checkbox"/>	582					Current	remove - make leader
<input checked="" type="checkbox"/>	1482					Current	remove - make leader
<input checked="" type="checkbox"/>	897					Current	remove - make leader
<input checked="" type="checkbox"/>	1480					Current	remove - make leader
<input checked="" type="checkbox"/>	1088					Current	remove - make leader
<input checked="" type="checkbox"/>	1027					Current	remove - make leader
<input checked="" type="checkbox"/>	424					Current	remove - make leader
<input checked="" type="checkbox"/>	404					Current	remove - make leader
<input checked="" type="checkbox"/>	872					Current	remove - make leader
<input checked="" type="checkbox"/>	326					Current	Leader remove - cancel leader
<input checked="" type="checkbox"/>	862					Current	remove - make leader
<input checked="" type="checkbox"/>	544					Current	remove - make leader
<input checked="" type="checkbox"/>	689					Current	Leader remove - cancel leader

58 members (58 selected)

**Do with selected** | Send E-mail

**Add member by name**  
- select member - Add

**Add member by membership number**  
Separate numbers by commas  
Add

Home - Groups List

All the boxes on the far left will be ticked in blue, ready for the next action. Click 'Do with Selected' to go to the email screen

Figure 12.

- The email screen will be presented, and maybe overlaid with the message below. This message is normal. Press **OK** to go to the next screen.

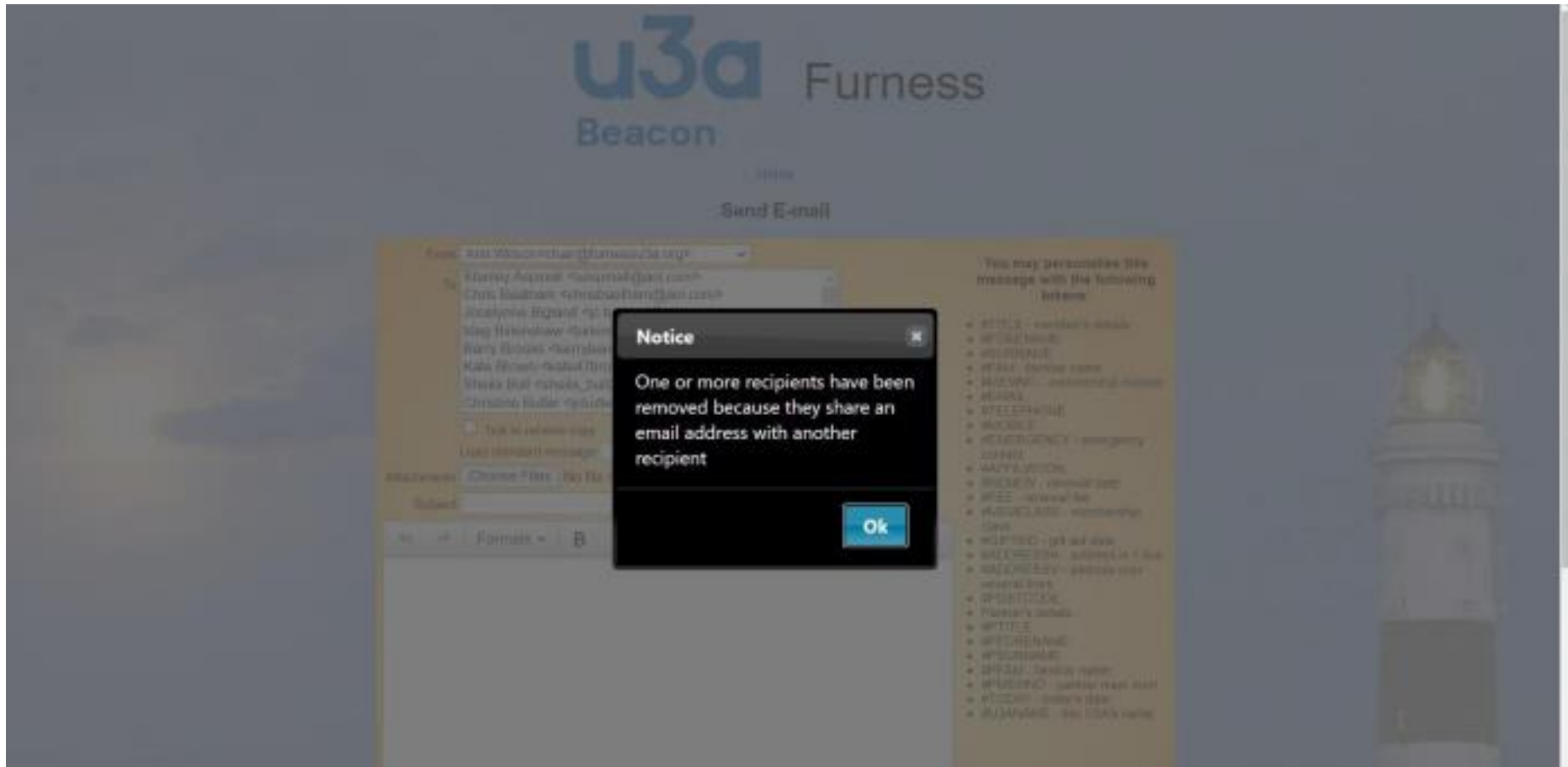


Figure 13.

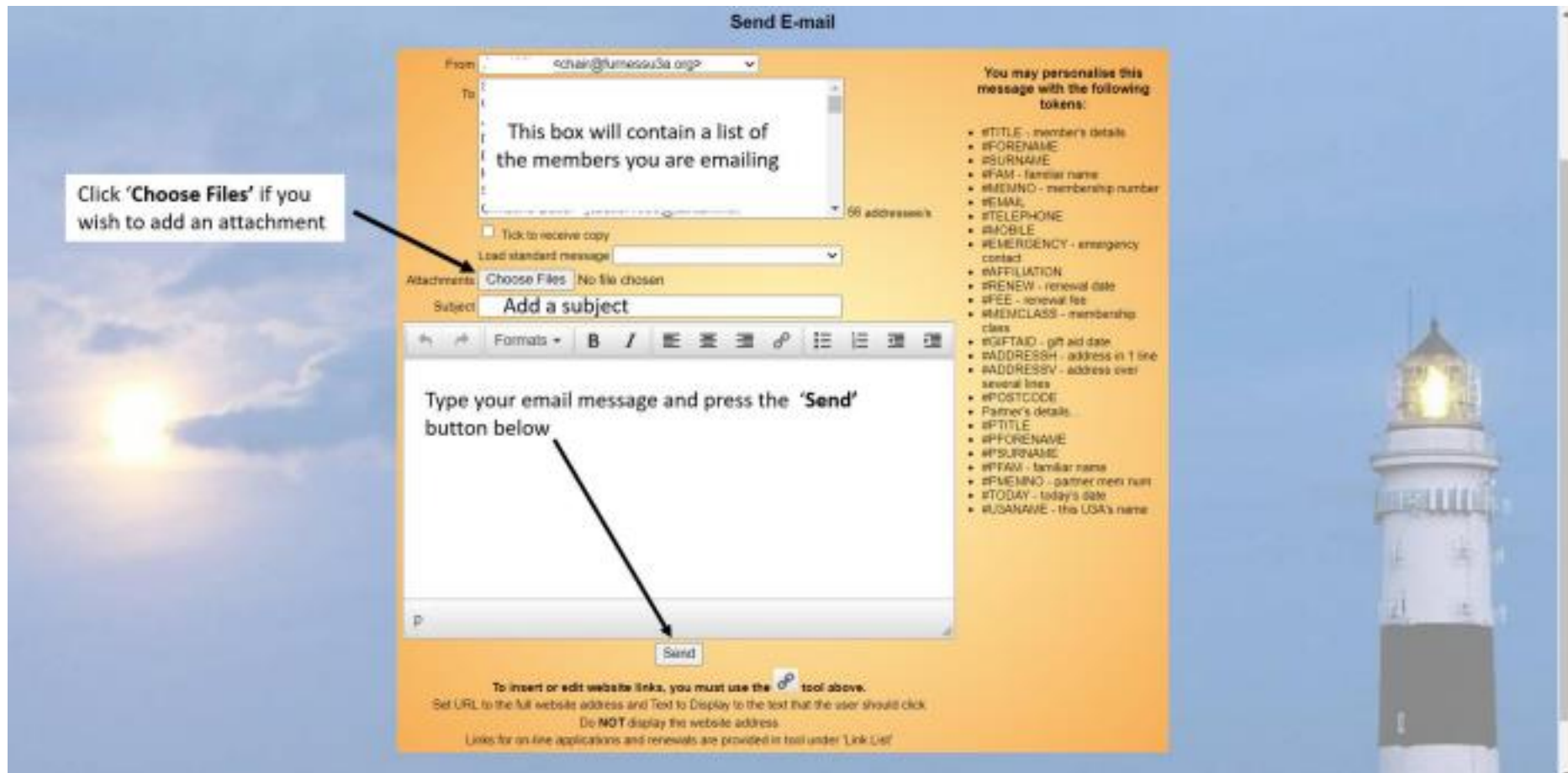


Figure 14.

- Compose your email message and click **'Send'**. You can also add an attachment from your files if you wish.
- Email confirmation screen will appear when the email is sent successfully.

## MORE INFORMATION

Group leaders have access to their own group page only.). You should find all you need in the Bicester u3a specific picture guide above, for adding members and sending emails. For additional information such as recording finances (How to use 'Ledger') follow the link/s below. Note the following instructions are for all group leaders nationwide although mostly applicable there may be minor differences

### b) Group Records

Groups for which you are a Leader or for which you have viewing or editing rights are highlighted blue. To view the **Group Record** for one of these Groups, click on the Group name in the Groups List, or elsewhere where Group names are shown.

Each Group Record comprises four sub-pages:

- **Details** [see 5.2](#)
- **Schedule** [see 5.3](#)
- **Members** [see 5.4](#)
- **Ledger** [see 5.5](#)

You can select between these on the row beneath the Group Record name **[F]**. The active sub-page has its name in black.



**Group Record for Architecture**

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

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**Group Details**

Group:

Faculty:     Status:     Max members:

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

When:

Normal start time:     End time:     Contact:

Venue:

Information:

Notes:

Group record created 28 Feb 2019 16:52; last changed 28 Feb 2019 16:52

For details of how to view and edit your Group Record pages, refer to parts 5.2 to 5.5.

## General background of the Beacon system

Beacon is the U3A movement's integrated membership, groups, finance and mailing system. It has a dedicated webpage at [beacon.u3a.org.uk](http://beacon.u3a.org.uk).

Beacon was developed within the U3A and has one job: to support volunteers in their day-to-day work. Beacon will evolve to meet the future needs of U3As.

U3A Groups, something central to U3As but not other organisations, are an important and integral part of Beacon. Beacon allows the membership secretary to be confident that those attending groups are members of the U3A, and it allows group leaders/conveners to keep track of their members. It even provides a simple book-keeping ledger for the groups to use.

The Finance module provides the tools a U3A treasurer needs to maintain and report on accurate financial records.

The Beacon mailing feature allows membership secretaries, group leaders/conveners and committee members to create customised mailing lists of their members and to send them information, complete with delivery tracking.

Beacon's membership module supports the maintenance of membership records in an intuitive way. It provides useful statistics,

Should you have questions you may find answers in the generic link below.

Here there are video introductions and a generic online user guide note it is not Bicester specific. . Group leaders do not have access to all facilities in the large guide available online link below.

**Online user guide** [User Guide – u3a Beacon \(zendesk.com\)](#)

Alternatively for local Bicester advice please contact [Beacon@u3abicester.online](mailto:Beacon@u3abicester.online)