

BEACON TRAINING FOR GROUP CONVENORS

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Before using this document, please check the [U3A Beacon](#) page in the Carlton & Gedling U3A website to confirm that this is the latest version (the version and date of the last update is shown in the footer of each page).

Introduction

This document consists of a number of short lessons for Group Convenors learning how to use the Beacon system.

- The lessons make several references to **Beacon User Guide chapters**. These chapters can be found on the [U3A Beacon](#) page in the Carlton & Gedling U3A website.
- **Lesson 1** describes how to log in to Beacon for the first time. You can skip this lesson if you have previously accessed the system.
- **Lesson 2** gives a general overview of the Groups menu.
- The remaining lessons consist of instructions that describe how to perform various operations, followed by exercises for you to try.

Lesson 1: Accessing Beacon for the first time

When your Beacon account was set up, an email was sent to you giving details of your username and a temporary password.

1. Click on this link to go to the Beacon login page: <https://u3abeacon.org.uk/password.php>
(There is also a link on the [U3A Beacon](#) page in the Carlton & Gedling U3A website)
2. Select **Carlton & Gedling** from the drop-down list of U3A's.
3. Fill in your username and the temporary password. Tick the *store local settings* box (if you don't do this you may have to go through the login process twice).
4. Fill in your **Username** and the temporary **Password**, followed by **Enter**.
5. You will be asked to type in a new password which must contain at least 1 upper case letter, 1 lower case letter and a numeric character.
6. Enter a personal security question with an answer. You can use the question presented (your first school) or change it to something else – something that is unknown by most other people. After pressing **Submit**, you will be taken to the Beacon *Home page*.

Further details about how to log in, along with some basic navigation tips are described in [User Guide: Chapter 3](#).

Lesson 2: Groups Menu Overview



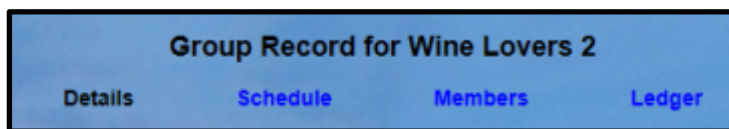
There are 3 menu picks available under the **Groups** heading on the Home page.

Follow the steps on this page to familiarise yourself with the information stored under the Groups menu picks.

Groups

1. Click **Groups** to see a list of all active Groups.
2. Click your Group name, which will be highlighted in blue.

This will take you to your **Group Record** which consists of 4 separate pages. Click each of the blue headings in turn to view each page.



- **Details** – shows the basic information about the Group (usual meeting days, times & venues, contact details, plus a description of what the Group does).
- **Schedule** – a list of forthcoming meetings.
- **Members** – a list of Group members with their contact details.
- **Ledger** – a record of financial transactions associated with the Group.

3. Click **Home** to return to the Home page.

Venues

1. Click **Venues** to see a list of locations where Groups can hold their meetings and places where Groups may meet when going on a trip elsewhere (these all start “*Meet at ...*”).
2. Click on any Venue to see additional information (address, website, map, cost of hire, etc.).
3. Click **Home** to return to the Home page.

Calendar

1. Click **Calendar** to view the Calendar of forthcoming meetings and events.
2. Change the *To* and *From* dates to focus on a particular time period.
3. Tick **Show Detail** to see any additional details about the meetings. Un-tick **Show Detail** to return to the previous view.
4. Click **Download pdf** (below the table), followed by **Save** or **Save as** and then **Open** to view a pdf version of the Calendar.
5. Close the pdf file and click **Home** to return to the Home page.

Lesson 3: Adding and Removing Group Members

Go to your **Group Record** as described in Lesson 2.

Tip: clicking one of the blue letters above the Groups table will take you straight to the groups starting with that letter.



Click **Members** to display a list of your Group members. Read the notes on this page before doing the exercise below.

- Members that have not renewed their membership for the current year show up in **red text**.
- Members that have not provided an email address are denoted by this icon:



- The Chairman (Tom Grainger) & Webmaster (Graeme Bunting) are included as members of all Groups. This is so that they are copied in on your emails to Group members. Everyone is a member of the Trips & Visits, Theatre and General Meeting groups.

Adding and Removing Members

The blue links on the right of the table can be used to:

- Remove a member from the group
- Make a member a Group Convenor (there can be more than one Convenor for each group)
- Remove a member from the Convenor role.

Members can be added to the group by selecting their name from the drop-down list in the [Add Member by Name](#) section below the table, and then pressing the **Add** button.

Tip: when a drop-down list is selected, typing the first few letters of a name will jump to the first name starting with those letters.

Exercise

1. Add a member to the group using the **Add Member by Name** drop-down list below the table.
2. Remove the new member from the group by clicking **remove** in the right column.

Lesson 3a: Downloading a list of Group Members

Go to your **Group Record** as described in Lesson 2 and click **Members** to display a list of all the members of the Group. Read the notes on this page before doing the exercise below.

There is a drop-down list below the table that can be used to perform the following operations with selected members:

- Send an email
- Download a list of group members in Excel or pdf format.

One or more members can be selected individually by ticking the boxes in the left hand column - or all the members can be selected by clicking **Select** (at the top or bottom of the left column), followed by **Select All**.

The required operation from the drop-down list is initiated by pressing the **Do with Selected** button.

Exercise

1. Select all the members in the group (**Select > Select All**)
2. Download an Excel list of group members by selecting **Download Excel**, followed by **Do with Selected**. When prompted, choose which fields you wish to include (email address, phone numbers, address, etc.).
3. Close the Excel file and select all (or some) members in the group again.
4. Download a pdf list of group members by selecting **Download PDF**, followed by **Do with Selected**. When prompted, choose which fields you wish to include (email address, phone numbers, address, photo, etc.).

Lesson 3b: Emailing Group Members

To send an email to all (or some) of your group members, follow the steps described in Lesson 3a (choosing **Send email** from the drop-down list). This will open up a new page where you can compose your email.

- Basic text formatting can be done using the buttons above the main body of the email (hover the cursor over the buttons to display the meaning).
- The *tokens* listed on the right side of the page can be used to personalise the email, e.g. typing **Dear #FAM** customises every email with each member's *Familiar Name*.

Familiar Name is where a member prefers to be known by a different name to their given forename (e.g. Bill instead of William).

#FAM should be used in emails, rather than **#FORENAME**.

- Files can be attached to the email by clicking the **Browse** button and selecting the file(s) from your computer, followed by **Open**.

More details about sending emails can be found in [User Guide: Chapter 4](#) sections [A] and [B].

Exercise

1. Select your own name from the list of group members by ticking in the left column.
2. Choose **Send email** from the drop-down list, followed by **Do with Selected**.
3. Enter a title for the email in the *Subject* field, e.g. *“Test 1”*.
4. Enter some text in the main body of the email
e.g.

*“Dear #FAM,
This is a test email sent from Beacon.”*

5. Tick the *‘tick to receive copy’* box.
6. Press the **Send** button to send the original (personalised) email and a (non-personalised) copy to yourself.

When they arrive, note that the original will include your Familiar Name, whereas the copy will say *“Dear #FAM”*.

7. Send more test emails to yourself (experimenting with other tokens, the formatting and adding attachments).

Lesson 3c: Reports & Photos for the Newsletter & Website

Beacon has been set up so you can easily submit your reports and photos for inclusion in the Newsletter and Website, as follows:

1. Select **U3A Officers** from the Home page.
2. Tick the boxes adjacent to the newsletter Editor and Webmaster in the *Select* column.
3. Click **Send email**.
4. In the *Send Email* page, pick **Newsletter & Website – Report Submission** or **Newsletter & Website – Photos Submission** from the *Load Standard Message* drop-down list.

You can either add a report as a file attachment or type the report in the main body of the email (but be aware that the send email screen will time out if left open too long).

Exercise

1. Follow steps 1 to 4 above to see how the process works.
2. Unless you have a real report or photos to submit, don't go any further – click the *Home* link at the top of the page to return to the Home page. (***do not click the Delete Standard Message box***)

Lesson 4: Group Schedule

Go to your Group Record as described in Lesson 2 and click **Schedule** to display a list of all forthcoming Group meetings. Read the notes on this page before doing the exercise below.

To edit existing meetings

The blue links on the right of the Group Schedule table can be used to:

- Edit a Meeting
- Delete a meeting

To add a single Meeting

1. Go to the **Add Events** section at the bottom of the page.
2. Amend any of the pre-filled fields if required. Click on *First date and time* and select the date of the new meeting. Edit the time (if required) by typing the new time directly in the box, or by using the hour and minute 'sliders'. Then press **Done**.
3. Enter a **Topic** for the meeting, if required:
4. Enter additional information about the meeting in the **Details** field, if required:
5. Press the **Add Events** button

Notes:

- A topic is not required for regular meetings that are always the same format, e.g. for groups like Badminton, Bridge, Coffee Morning, Making Music, etc.
- For the walking groups, a typical **venue** entry would be *Meet at Ranmoor Road car park* and a typical **topic** entry could be *Netherfield Lagoons walk*.
- For the Trips & Visits group, a typical **venue** entry would be *Meet at Richard Herrod* and a typical **topic** entry could be *Trip to Oxford*.
- For groups that have a different theme/topic each month, typical **topic** entries could be *Theme: Lyric Poetry*, or *Discussion topic: The European Referendum*
- For the Theatre group, typical topic entries could be *Musical – Mama Mia*, or *Play – The Government Inspector*

For further guidance, look at some of the existing entries on the Calendar.

To add Multiple Meetings

A series of recurring meetings on a regular day each week or each month can be added in one operation as described in **User Guide: Chapter 6**, section [A2].

Exercise

1. Add a new single meeting, starting by clicking in the *First date and time* box, selecting the date and time, followed by **Done**.
2. Add or edit the venue, topic and details for the new meeting (if required) and then click **Add Events**.
3. After the new meeting has appeared in the Group Schedule, click **Edit**. Make some changes to one or more of the fields before clicking **Update**.
4. Delete the new meeting (unless it is a real meeting that you wish to keep).
5. Create 3 recurring meetings on the 1st Wednesday of the month as follows:
 - a) Select the first Wednesday of next month in the *First date and time* box
 - b) Select **1st Wed of each month** in the *then every* drop-down list
 - c) Enter **3** in the *Number of Events* box and then click **Add Events**.
6. Delete the 3 new meetings.

Lesson 5: Group Ledger

Go to your **Group Record** as described in Lesson 2 and click **Ledger**. Read the notes on this page before doing the exercise below.

The Ledger is a tool for recording a Group's financial transactions and keeping a running total of the balance. It is completely separate to the main Treasurer's ledger.

New transactions are added in the section at the bottom by filling in the date, payee, detail and the amount paid in or out, before pressing **Save**.

The blue links on the right of the ledger can be used to:

- Edit a transaction
- Delete a transaction

Exercise

1. Add an "In" transaction, e.g.

Payee: Members
Detail: Subs, 12 at 1.50
Amount: £18.00
(change the date if it is a historical transaction)

2. Add an "Out" transaction, e.g.

Payee: Richard Herrod
Detail: Room hire
Amount: £16.00
(change the date if it is a historical transaction)

3. Check that the balance is as expected (£2.00 for the example above)
4. Edit one of the transactions.
5. Delete the transactions (unless they are real and you wish to keep them).

REVISION LOG

Rev.	Date	Section	Changes
v1	2016-03-28		First Issue
v2	2016-03-29	all	Minor updates
v3	2016-05-26	all	Lesson 3 re-written. Minor updates to other lessons.
v4	2017-02-03	all	Minor updates