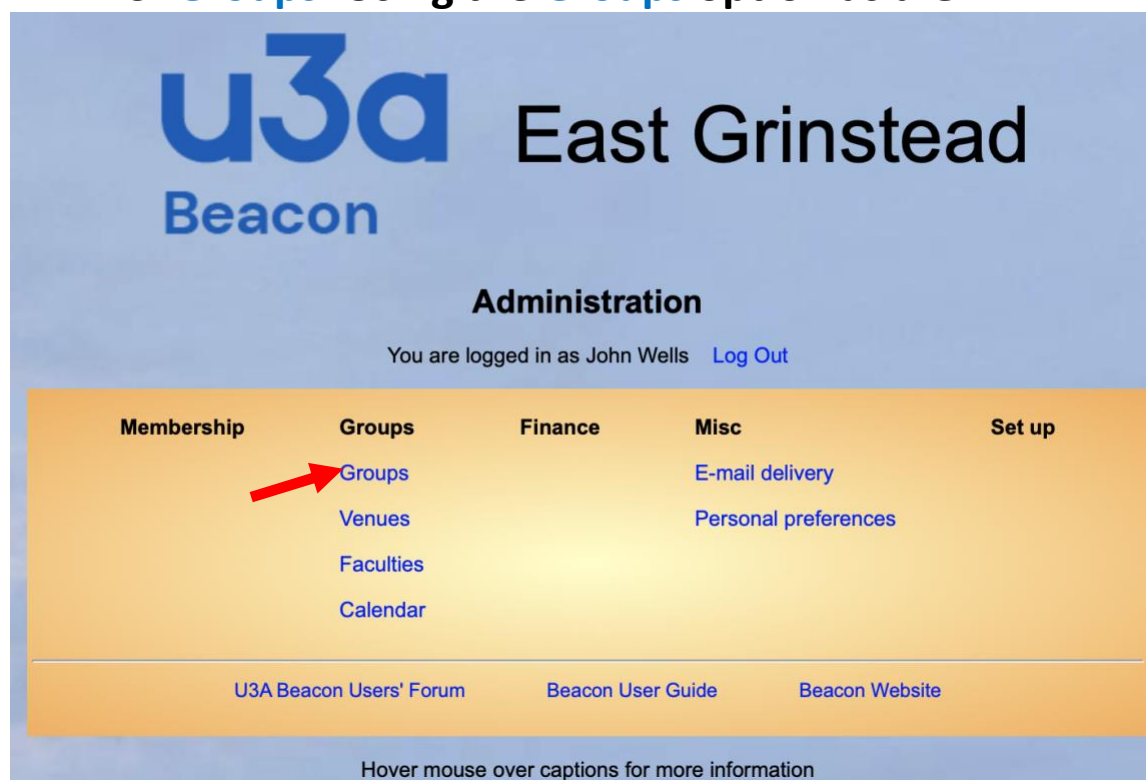


Getting started with Beacon – A HOW TO guide for group leaders in bite-sized steps

PART 3: **Groups**. Using the **Groups** option as a GL



Once logged in this is your MAIN MENU

As a GL you can use everything that is shown (in blue!) under the columns labelled GROUPS and MISC. You also have access to the three items shown below the line.

In PART 3 we are focusing on GROUPS

Click on the option indicated above by the red arrow

You are presented with a list of ALL groups in alphabetical order. All apart from your own group(s) are listed in BLACK. You are able only to look at or edit your own group, which is listed in BLUE

For simplicity only a small section of the screen is displayed to show important features

The screenshot shows the 'Groups' page in Beacon. At the top, there is a 'Faculty' dropdown menu set to '- any or none -' and a checked 'Show active only' checkbox. Below this is a navigation bar with letters A through Z. A red arrow points to the 'Group' column header, another points to the 'Where' column header, and a third points to the 'Leaders' column header. The table below shows a list of groups. The first group, 'All Seasons Walking Group', is highlighted in blue, indicating it is the user's own group. The other groups are in black.

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
<input checked="" type="checkbox"/>	All Seasons Walking Group	Y	2nd Tuesday in the month	Outdoor activity	Richard Argyle	39	40	
<input type="checkbox"/>					Andrew Mason			
<input type="checkbox"/>	Ambling	Y	3rd Tuesday in the month	Outdoor activity	Brian Foxwell	35	40	
<input type="checkbox"/>					Ken Stacey			

Sorting columns

The three arrowed columns – **Group**; **Where** and **Leaders** can all be sorted – double click on the field to sort.

The “Show active only” check box defaults to show only ACTIVE groups. If you uncheck it all groups are shown, including those tagged as INACTIVE, But your group is ACTIVE anyway, so you won’t be using it!

A to Z letters – you can go straight to a letter of the alphabet – e.g. Click on “S” to go to the “S” section

[Home](#)

Groups

Faculty ☒ Show active only

Operations at bottom of page

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

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲ ▼	A							
<input type="checkbox"/>	All Seasons Walking Group	Y	2nd Tuesday in the month	Outdoor activity	Richard Argyle	39	40	
<input type="checkbox"/>					Andrew Mason			
<input type="checkbox"/>	Ambling	Y	3rd Tuesday in the month	Outdoor activity	Brian Foxwell	35	40	
<input type="checkbox"/>					Ken Stacey			
▲ ▼	B							
<input type="checkbox"/>	Basic Bridge	Y	Every Tuesday	Forest Row Community Centre Main hall	Kath Wightman	18	32	
<input type="checkbox"/>	Book Club 1	Y	First Tuesday in the month	EG Library	Judith Wells	11	10	1
<input type="checkbox"/>	Book Club 2	Y	2nd Thursday in the month	EG Library	Linda Edwards	13	10	
<input type="checkbox"/>					Gillian Paine			
<input type="checkbox"/>	Book Club 3	Y	3rd Thursday in the month	Private	Fi Harvie	5		
<input type="checkbox"/>	British Cinema Social history	Y	4th Tuesday pm in the month	The Glebe Centre	George Pearson	20	20	
<input type="checkbox"/>	British History	Y	1st and 3rd Friday i the month	Forest Lodge	Rita Des Forges	17		
<input type="checkbox"/>					Jan Langridge			

How many members in the group?

Under the top line, the last three headings are important. You will see four options.

- **MEMBERS** is the number of members currently in the group
- **MAX** is the maximum number of members – as set by the GL
- **WAITING** is the number of members in the WAITING LIST for a group

The GL can manually admit as many members as he/she likes. But if a member of our u3a instead asks to join via the Beacon Portal they will be directed to the waiting list, as in the case of the BOOK CLUB 1 group above. Judith has reduced the MAX figure to 10 because of meeting room constraints, but there are already 11 members in the group, so any would-be joiner will be waitlisted. (See the red arrow)

The group record in detail

To access your group record, click on the line concerned. We will take **Book Group 1** as our example.

Group Record for Book Club 1

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

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

Books are selected by members of the group and the library service reserves them for us on a group ticket. No one is obliged to lead a discussion although everyone is encouraged to contribute their ideas and responses. Currently we have no vacancies but email me if you wish to join the waiting list. To find out more copy this link into your browser to view our web page ==> <https://u3asites.org.uk/east->

Notes

Group record created 5 May 2020 12:19; last changed 5 May 2020 12:19

There is a central panel entitled **GROUP DETAILS**, and four options above the panel.

DETAILS is in **BLACK** because you are now in that option.

Two of other three options will be explored later.

We are dealing with **MEMBERS** in this section only

Features of the central panel. See overleaf

The Group Details panel

Group:	The name of your group. Possible to change, but please don't
Faculty:	Not used
Status:	Will always be ACTIVE, unless you want to change to INACTIVE
Allow members to join online	Please leave this box checked
Enable waiting list	Please leave this box checked
Notify leader of changes	Please leave this box checked
Max members:	You can change this at will. It should be set to the maximum number of members you can reasonably handle (size of venue, etc)
When:	Free text describing when you meet
Start and End Times:	Set by you as GL
Contact:	The anonymous email ID set by IT ADMIN
Venue:	Selected from a dropdown list
Information:	Simple text information about your group. Keep it short and point to your web page
Notes:	Private information not for public consumption

The Members option

To access your Members, click on [Members in blue](#) above the details panel.

Group Record for Book Club 1

Details Schedule **Members** Ledger

☒ Joined members ☒ Waiting list

Group Members

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting
<input type="checkbox"/>	2021	E					remove - make leader
<input type="checkbox"/>	1414	F					remove - make leader
<input type="checkbox"/>	1464	A					remove - make leader
<input type="checkbox"/>	2556	S					remove - make leader
<input type="checkbox"/>	1033	~					remove - make leader
<input type="checkbox"/>	2334	L					remove - make leader
<input type="checkbox"/>	1193	M					remove - make leader
<input type="checkbox"/>	1336	V					remove - make leader
<input type="checkbox"/>	1183	~					remove - cancel leader
<input type="checkbox"/>	Emergency contact						
<input type="checkbox"/>	1625	F					remove - make leader

10 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add

Send email

93% of our members are on email so this will be the most used function. Sending emails is sufficiently important to be dealt with separately in PART 4

The RHS Action column

At the RHS you can choose three statuses for a member.

- **Remove** To physically remove a member who has left the group
- **Make leader** To tag any extra member as a "leader". See footnoteⁱ
- **Cancel leader** To cancel the "leader" status of a member

Your group can have as many members of your group tagged as “leaders” as you like. It is a very good idea to have at least two members tagged, in case of unavoidable absences, and also because both members will have access to the same data.

Members without email

If a member has no email address, this is shown in the left-hand column – it is signified by an envelope symbol struck out in red as below. Enid Isworth is without email ID but is also a (very active) group leader.

▲ ▼	D							
<input type="checkbox"/>	 Discussion group 1	Y	First Wednesday in month	Private	Enid Isworth	8	9	
▲ ▼	E							

Members who have failed to renew their subscription are highlighted in red

<input type="checkbox"/>	 1218	Marcia Everest		Current	remove - make leader
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The member listed above has failed to renew – but also has no email ID. If you regularly check on your list of members it becomes obvious where a member has not renewed. Don’t lose your unrenewed member but do remind them that they have yet to renew.

You have now completed PART 3

Go to HOME and LOGOUT. You are now back at the Beacon login screen

Now use your browser BACK button to return to the page of links

Next step: PART 4 - Dealing with emails

Please continue with “Getting started with Beacon – PART 4”

The term “Leader” is a badly chosen misnomer. But it is the only alternative status available! Use it to allow extra members of your group to participate in the running of the group. But ensure that additional “leaders” are configured correctly elsewhere in the system. Ask IT support to do this, because any additional “leader” needs both a Beacon System user ID and a small change to their personal record.