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### • Introduction

The Elmbridge U3A administrative system uses Beacon, a system produced for use by U.K. U3A’s. We have our own private space within the wider system so that our data is not seen by any other U3A but we have access to all of the facilities that Beacon provides. The day to day entry and management of our member, group and financial data makes use of these facilities. Group Leaders can use a subset of Beacon’s facilities to maintain information about their groups, as described below.

If you wish to use Beacon then you first need to ask the System Administrator (email [beaconadmin@elmbridgeu3a.org](mailto:beaconadmin@elmbridgeu3a.org)) to register you as a System User on Beacon, with rights to view the list of groups and venues. You will also be able to view details of your own group, add new members to the group and remove members from it. Beacon is the central location where up-to-date membership details are recorded. You do not have rights to edit details or delete members from the wider system, so don’t worry that you might delete important information accidentally!

**Please bear in mind that you are being given privileged access to member data, that you have a responsibility to use it solely for the purposes of carrying out your role as Group Leader and that you must never allow anyone else to access it.**

In order to comply with the General Data Protection Regulation and the terms of our licence to use the Beacon system, before we register you with the system, we need you to ensure:

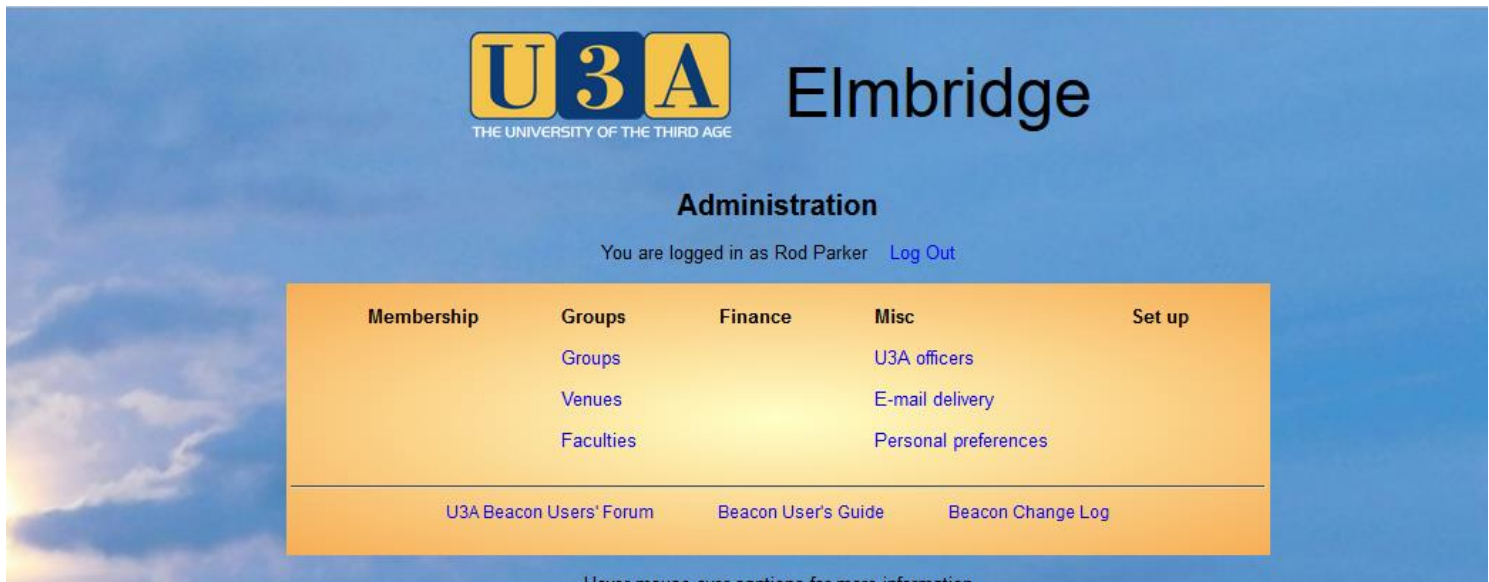
- that you do not let anyone else know your Beacon password
- that the machine(s) on which you run Beacon have installed on them robust and up to date firewall and virus checking software and that it is running at all times and not just when you are using Beacon
- that you have not and will not let anyone else access your Beacon account or otherwise see or access the data in Beacon
- that if you use a shared computer to access Beacon you will only do it using a personal log on
- that you do not access Beacon on a public computer or any computer using an insecure Wifi (e.g. a Library computer)

**Please add [noreply@u3abeacon.org.uk](mailto:noreply@u3abeacon.org.uk) to your Contacts email list. Without this you may find that some emails from Beacon will not get delivered.**

TIP: Do **NOT** use the back arrow on your browser to go back to a screen you saw previously. This is unreliable.

## Logging On

Go to [www.u3abeacon.org.uk](http://www.u3abeacon.org.uk), select Elmbridge as your U3A, tick the “This is a Private Computer” box and enter the user name and temporary password that you have been allocated. You will have the opportunity to change the password to one of your choice. (If, later, you forget it you will need to click the Click here link at the bottom of the log-in page.) *You might like to look at the Quick Start guide at the end of this document before reading on.* When you log on you will see this menu.



Clicking on “U3A Beacon User Guide” gives you access to the full User Guide, section 5 of which will be worth reading after you have absorbed the information in this document.

Clicking on E-mail deliveries allows you to track what happens to emails that you send via Beacon.

Clicking “Personal preferences” gives you the opportunity at any time to change your password and security question.

## Using Beacon’s Groups Facilities

**Tip:** Words in blue are links which when clicked usually take you to a different page. This will usually replace the current page. However, if you hold down the Ctrl key when clicking a link or when pressing a button, the new page will appear in a new tab. This is a very useful facility and can be used to look up or edit other information without closing the current page. For example, you may wish to examine a member's record without closing the list of members. When you return to the first page (simply by clicking its tab) it will not have reloaded and therefore its position will not have changed making it easier to go on to a later member. Note that, in some pages, data in the first page will be automatically updated to reflect changes made in the second page. However, in other pages this has not yet been implemented and changes will not be shown until the page is refreshed.

**Beacon maintains a record for each group and its members.**

*Group Leaders can:*

- edit the descriptions of their groups
- add and delete members from their groups
- nominate and change their groups’ leaders

Members can be added only by using their member numbers. This is to avoid attempts to enter non-members into the database and to conform to Data Protection legislation.

To display the information about your group, click on Groups. You will see a screen similar to the one below. Whilst all of the groups will be listed, only the ones for which you are a leader will be accessible. The names of accessible groups will appear in blue.

**Groups**

Faculty - any or none -  Show active only

**i** 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
<b>▲ ▼ A</b>								
<input type="checkbox"/>	Art Appreciation	Y	Alt Weds	Esher	Chris Creagh Brown	13	8	5
<input type="checkbox"/>	Art Appreciation - 2	Y	Alt Weds	Sunbury	Jenny Smith	6	6	
<input type="checkbox"/>	Aviation	Y	4thThurs	West Molesey	Howard Freeman	15		
<b>▲ ▼ B</b>								
<input type="checkbox"/>	Backgammon	Y	Frids	Hersham	Laila Eletre	1		
<input type="checkbox"/>	Badminton	Y	Thurs	Walton Scout Hut	Janet Bradshaw	11	8	3
<input type="checkbox"/>	Biography	Y			Anna Almond	1		
<input type="checkbox"/>	Book Reading - 1	Y	First Monday each month	Shepperton	Robyn Daley	1		
<input type="checkbox"/>	Book Reading - 2	Y	4th Thursday	Walton	David Weatherly	7		
<input type="checkbox"/>	Book Reading - 3	Y	Alt Weds	West Molesey	David M...	7		
<input type="checkbox"/>	Watercolourists	Y	Alt Frids	Claygate	Kathleen Moreton	1		
<input type="checkbox"/>	Wine Appreciation	Y	3rd Thurs	Rotation	Alan Howe	13		
<input type="checkbox"/>	Writing your Life Story	Y	2nd and 4th Tues	Rotation	Eric Leigh	7		
<b>▲ ▼ Y</b>								
<input type="checkbox"/>	Yoga - 1	Y	Alt Thurs	Long Ditton	Celia Rowe	15		
<a href="#">Select</a>	<a href="#">Group</a>	<a href="#">Active</a>	<a href="#">When</a>	<a href="#">Where</a>	<a href="#">Leaders</a>	<a href="#">Members</a>	<a href="#">Max</a>	<a href="#">Waiting</a>

109 groups; 109 leaders (0 selected)

**i** 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

Clicking on one of your group’s names will open a screen similar to the one below.

“Max members” allows you to specify the maximum number of active members allowed in your group. *If you do this, currently, the option to allow members to join on-line is not displayed. As it happens, allowing members to join on-line is not recommended because, normally, it is better for you to talk to candidates first. If we ever do change our advice to recommend joining on-line you will need, if it is displayed, either to leave “Allow members to join on-line” blank if you wish to prevent them from doing so or to tick it to allow them to do so. If you have ticked “Notify leader of changes”, you will receive an email notifying you when a member joins on-line.*

If you want to have a Waiting List, tick “Enable waiting list”. If you do not, leave it blank. If you do want it you will need to specify a number for Max members.

If you have opted to have a Waiting List, when a new member joins the group and if the maximum number is exceeded, they will be shown as on a Waiting List. You can transfer a member from the waiting list to become an active member by clicking the Join Group button against their name.

Members who are not currently paid up or who have left will be shown in red. If they do not pay up or rejoin, you must delete them from the group – see below.

If you make any changes to the information shown, remember to press Save Record afterward.

### Adding and Deleting Members

Clicking on “Members” produces a screen listing the current members of the group. This shows, for each of them, their name, address, telephone number(s) and emergency contact details.

Select	Name	Address	Telephone	Mobile	Status	
<input type="checkbox"/>		144	01		Current	remove - make leader
Emergency contact: [text]						
<input type="checkbox"/>	Philip	9 Avd	020 83		Current	remove - make leader
Emergency contact: [text]						

Do with selected | Send E-mail

53 members (0 selected)

At the foot of the screen you will see “Add member by membership number”. You can enter one or more membership numbers here (if more than one, separate them by commas and do so **without** spaces). Pressing Add will produce a list showing their names and asking for confirmation before they are added to the group.

You can delete a member by pressing “remove” in the rightmost column and then confirming the deletion when asked to do so. You can delete several members at once by ticking their names in the “Select” column and then, at the foot of the page clicking “Do with selected” and using the remove members option.

You can also hand the leadership over to another member – of course by prior agreement with your intended successor - by first clicking “make leader” against that member’s name and then clicking “cancel Leader” against your own name. **It is important to create the new leader first before removing the existing one!**

### Members Adding Or Removing Themselves To/From The Group

If you enable the facility, members can add themselves to or remove themselves from groups via their members' portal.

In the Groups record, on the Details page, check that "Allow members to Join Online" and "Notify Leader of Changes" are ticked and that “Max members” is blank.

You will then receive emails telling you of any changes.



Please note - if you enter a maximum number, then, even though the group has not reached that number, the option to join on-line is not displayed.

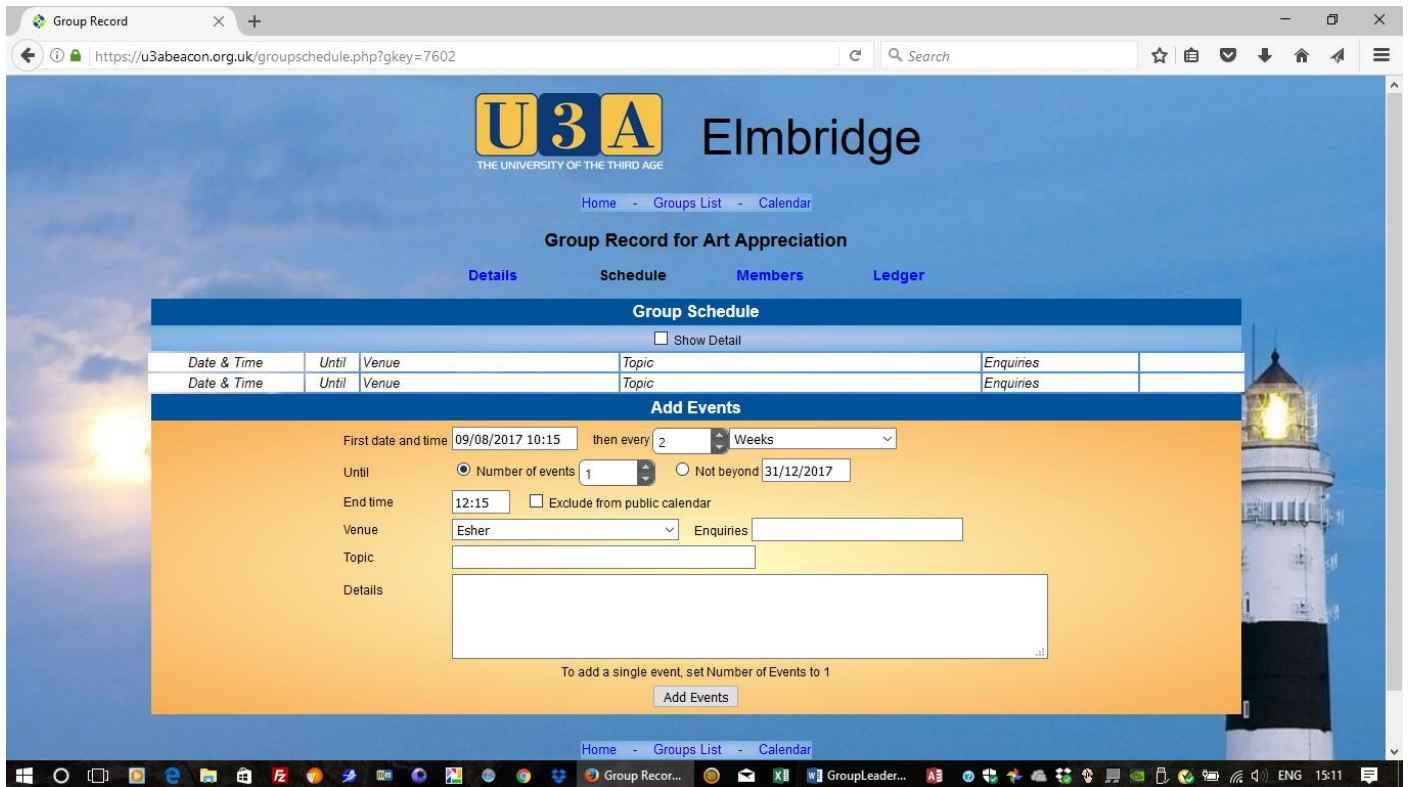
The box "Enable Waiting List" only functions if you have entered a maximum number.

## Emailing Your Group's members

If you want to email one or more of the group's members, tick to select them and then click "Do with selected" and choose the email option. Beacon will offer you a form on which to construct the email and then allow you to email it. The form shown has a number of "#Tokens" which you can insert in the text of your email and which will be converted to text appropriate to each separate recipient. For example, if you insert #FAM in the email, for each separate member it will be converted to that member's familiar name. A full list of these tokens is given in Appendix A.

## Schedule

Clicking this produces a screen similar to the one shown below. You can use it to maintain a schedule which can be seen by group members. Read Section 5 of the full user guide (click "U3A Beacon User Guide" at the foot of the Home (log on) screen).



## Ledger *Initially we are not implementing this facility*

You have access to the group's Ledger. If you wish, you can use this screen to keep track of payments and expenses for your group. It is not connected to the main financial ledgers, so you will not affect any information used by the Treasurer. Again, a fuller explanation can be found in Section 5 of the full user guide (click "U3A Beacon User Guide" at the foot of the Home (log on) screen).

Group Ledger for Art Appreciation

https://u3abeacon.org.uk/groupledger.php?gkey=7602

U3A THE UNIVERSITY OF THE THIRD AGE Elmbridge

Home - Groups List

Group Record for Art Appreciation

Details Schedule Members Ledger

Group Ledger

From 1/1/2017 to 31/12/2017

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00

Add transaction

Date	Payee	Detail	In	Out
09/08/2017				

Save

Home - Groups List

## Appendix – Quick Start User Guide and Tips

To familiarise yourself with the system, try the following:

1. Confirm that you have access to Groups and Venues under the Groups Heading, and to U3A officers, E-mail delivery and Personal preferences under the Misc Heading.
2. You will also find, at the bottom of the orange box, links giving you access to the Users' Forum, and the User's Guide. You can ignore these unless you are particularly interested in finding out more about Beacon.
3. Read the news area in the grey box on the lower half of the screen. You may find something of interest there from time to time.
4. Click on the blue Groups link in the top half of the orange box. This will give you a list of all of the current Elmbridge U3A Groups.
5. Find your own group in the list. (You can use the blue alphabet to jump to groups beginning with a particular letter).
6. The title of your group will be in blue, and you can click on the title to get to the details of the group. NOTE: you also have view-only access to any other groups of which you are a member.
7. Click on the blue links above the Group Details box to see a Schedule of meetings (this will be blank unless you have added events) and to see a list of current members.
8. Click on the blue Groups List link to go back to the list of groups

TIP: Do **NOT** use the back arrow on your browser to go back to a screen you saw previously. This is unreliable.

Have a play with the system to familiarise yourself with it. Feel free to view or download the User Guide if you are interested!

### Further Useful Details

- Logging In - you may find that the first time you enter your Username and Password the system deletes the information leaving the boxes empty. This is a known bug. Just enter your Username and Password a second time. If it continues to do it then, almost certainly, you are not entering the correct information. It has to correspond EXACTLY to what is held in the database. For example "joe" is not the same as "Joe". If your email or post code have changed and the database has not been updated then the log on will fail.
- Your details may not be accepted if you copy and paste them into the boxes, better to re-type them each time.
- Passwords are case-sensitive.
- If you forget your password, click the Click here link at the bottom of the login page.
- Membership numbers: Each member has a unique membership number, when they join your group you must find out what it is. If they cannot provide one, check with the Membership Secretary. They may not be a member and, if so, should not be allowed to participate.

- Faculties: Each group has been assigned to a Faculty. You can see groups in just one faculty by using the drop-down list on the Group page to show you all of the available faculties in Elmbridge U3A. You can see your group's faculty by viewing the group's details. Beacon gives us the opportunity to place interest groups within Faculties.
- Venues: We do not give private addresses. You can see the current list of Venues by using the drop-down list on the Group page

## Appendix A - Email Tokens

#TITLE is replaced by the member's title

#FORENAME is replaced by the member's forename

#SURNAME is replaced by the member's surname

#FAM is replaced by the member's familiar (nick/known as) name

#MEMNO is replaced by the member's member number

#EMAIL is replaced by the member's email address

#TELEPHONE is replaced by the member's land-line telephone number

#MOBILE is replaced by the member's mobile number

#EMERGENCY is replaced by the member's emergency contact information

#AFFILIATION is not used by Elmbridge U3A

#RENEW is replaced by the date on which the member is next due to renew his or her membership

#FEE is replaced by the current Fee that the member would have to pay if paid on time

#MEMCLASS is replaced by the member's membership class (Individual, Joint, Honorary)

#ADDRESSH is replaced by the member's address shown in a single line

#ADDRESSV is replaced by the member's address shown over several lines

#POSTCODE is replaced by the member's postcode

#TODAY is replaced by today's date

#U3ANAME is replaced by Elmbridge

There are other Tokens but they are unlikely to be needed by Group Leaders.