



# **Ravenshead U3A**

## **Beacon training for**

### **GROUP LEADERS**

# LOGIN AS A GROUP LEADER

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## A. Logging on for the first time

1. When a Beacon account has been set up for you by the administrator, who is a RU3A committee member, an email will be sent to you giving details of your username and a temporary password.
2. Go to the Beacon login screen: <https://u3abeacon.org.uk/password.php> (or search for 'U3A Beacon')
3. Select **Ravenshead** from the drop-down list of U3A's.
4. Fill in your username and the temporary password.
5. Click **Enter**.
6. You will be asked to type in a new password which must contain at least 1 upper case letter, 1 lower case and a numeric character.

Passwords should comprise between 8 and 15 characters including at least one upper case, lower case and numeric character. Do not use common words. You may optionally consider using the following special characters: \_ - \$ ^ % ! # < > .

New password

Good password

Confirm

Confirmed

**Please also enter a personal question and answer**

You may answer the question given or change it to something else. The answer should be unknown by most other people.

Question

Answer

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 into the system.

## B. System User Roles

As a Group Leader, you have been given specific access to the Beacon System. There are different levels of access for different roles such as Membership Secretary, Treasurer, Chair etc. GLs are not able to delete or amend the membership database. You only have permission to add, amend or delete members of your own group so do not worry about making a mistake – this is not fatal, and you are advised to speak to one of the trainers or the administrator.

## C. Groups Page

After logging in you will be taken to the Beacon Home page. You will see the blue links shown below, which indicate the pages of the system you can access.



The main page GLs will be interested in will be the Groups page under the Groups heading.

- Clicking a blue link usually closes the current page and jumps to a new page.
- Holding down the **Ctrl** key while clicking a blue link opens the new page on a new tab while keeping the existing page open.

Clicking the blue Groups link will take you to the Groups page shown below.

Select	Group	Active	When	Where	Leaders	Members (Max)	Waiting
<input type="checkbox"/>	<a href="#">A</a>						
<input type="checkbox"/>	Angling	Y	No Fixed Time	No fixed venue	Lionel Castle	1	
<input type="checkbox"/>	Antiques	Y	monthly	Home	Maureen Smith	18	
<input type="checkbox"/>	Art Gallery or Museum	Y	No Fixed Time	No fixed venue	David Turner	1	
<input type="checkbox"/>	<a href="#">B</a>						
<input type="checkbox"/>	Beginners Bridge	Y	2nd & 3rd Wed	The Centre	Maria Gabrielczyk	7	
<input type="checkbox"/>	Birders Group	Y	Monthly	No fixed venue	Graham Jukes	15	
<input type="checkbox"/>	Board Games Group 1	Y	3rd Tuesday	Brammer Room	Susanne E Smith	17	
<input type="checkbox"/>	Board Games Group 2	Y	1st Tuesday	Brammer Room	Les Newey	12	
<input type="checkbox"/>	<a href="#">C</a>						
<input type="checkbox"/>	Canasta	Y	2nd & 4th Tuesday	Brammer Room	Trevor Davy	21	
<input type="checkbox"/>	Chess and Backgammon	Y	1st & 3rd Monday	Home	Jan Fraser	15	
<input type="checkbox"/>	Computing Beginners	Y	No Fixed Time	Home	Alan Paul	1	
<input type="checkbox"/>	Craft workshops	Y	Thursday	The Centre	Kate Asquith	18	
<input type="checkbox"/>	Creative Writing	Y	Friday after monthly meeting	Home	David Turner	9	
<input type="checkbox"/>	Cryptic Crossword	Y	Thursday	Home	Frances Gilbert	8	
<input type="checkbox"/>	Current Affairs	Y	3rd Wednesday	The Centre	Carol Wright	11	

The Groups table lists all the Groups in RU3A. This table can be sorted by clicking the headings at the top. The Alphabet Letters will enable you to jump quickly to a specific group. Only the group or groups that you are Group Leader of will have a blue link to other pages. Clicking on your group's name will open a page with four headings at the top. (see below)

- **Details Page**

All groups have a Details page. This can be edited by the GL. Some of the options are not needed at this stage until the Members Portal is activated. However it is worth considering, for example, if you would like to enable a waiting list for future members to join your group and the other options.

The screenshot shows the 'Group Details' page for 'ZTestGroupwithJudithasGL'. The page has a blue header with the U3A Ravenshead logo and navigation links: Home - Groups List - Venues. Below the header, there are tabs for Details, Schedule, Members, and Ledger. The 'Details' tab is active, showing a form with the following fields and options:

- Group: ZTestGroupwithJudithasGL
- Faculty: [Dropdown]
- Status: Active
- Max members: [Input]
- Options:
  - Allow members to join on-line
  - Enable waiting list
  - Notify leader of changes
- When: anytime
- Normal start time: [Input]
- End time: [Input]
- Contact: [Input]
- Venue: [Dropdown]
- Information: [Text Area]
- Notes: Try things out and delete as needed

At the bottom, it says 'Group record created 26 May 2018 13:11; last changed 26 May 2018 13:11' and has a 'Save Record' button.

- **Schedule**

The schedule page enables a GL to alter information about the timings of the group. This would take effect in the members portal where a Calendar of Meetings and group events for all members is shown.

The screenshot shows the 'Group Schedule' page for 'ZTestGroupwithJudithasGL'. The page has a blue header with the U3A Ravenshead logo and navigation links: Home - Groups List - Calendar. Below the header, there are tabs for Details, Schedule, Members, and Ledger. The 'Schedule' tab is active, showing a table for existing events and an 'Add Events' section.

The 'Group Schedule' section has a 'Show Detail' checkbox and a table with the following columns: Date & Time, Until, Venue, Topic, Enquiries.

The 'Add Events' section has the following fields and options:

- First date and time: 26/05/2018 10:00
- then every: 2 Weeks
- Until:  Number of events: 1  Not beyond: 31/12/2018
- End time: [Input]
- Exclude from public calendar:
- Venue: [Dropdown]
- Enquiries: [Input]
- Topic: [Input]
- Details: [Text Area]

At the bottom, it says 'To add a single event, set Number of Events to 1' and has an 'Add Events' button.

- **Group Members**

The members of the group can be shown by clicking the members link.

Currently, this shows each member with their address and telephone numbers alongside.

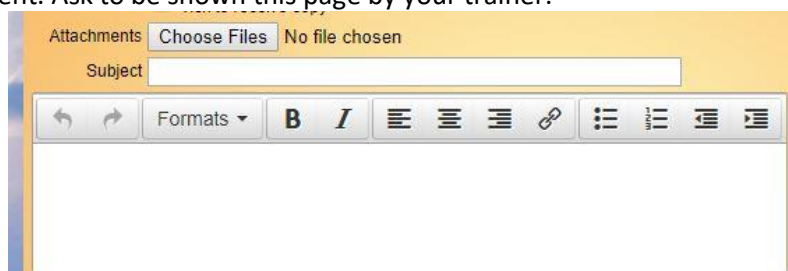
*You will be required to sign an undertaking to comply with the RU3A data protection and privacy policies.*



Group members can be added by membership number. They can be removed by clicking the 'remove' link at the side. Normally, you should not make anyone else leader without the knowledge of the Group Coordinator.

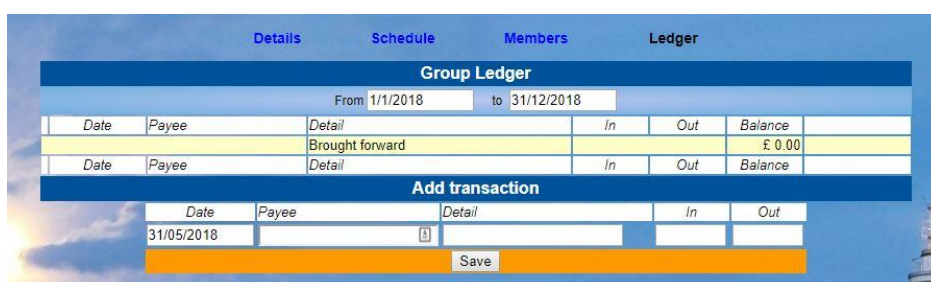
- **Email**

By selecting a group member, (click in the box by the side of the name) you can email one or more members of the group. Click 'do with selected' to open the email page where you can write your message and add attachments. Ask your trainer to demonstrate this. Note: The 'email delivery' page will show a list of messages you have sent. Ask to be shown this page by your trainer.



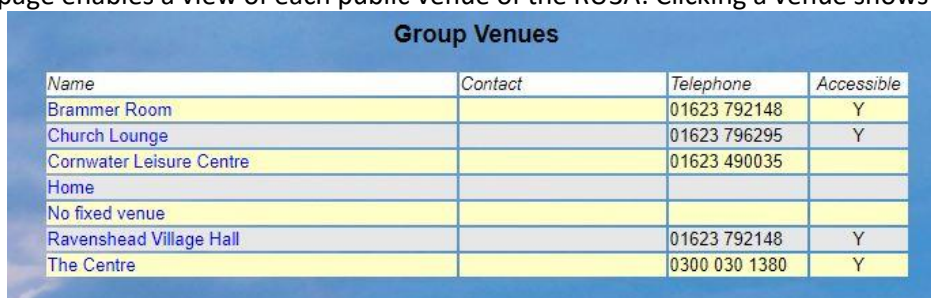
- **Ledger**

The Ledger page enables a Group leader to record group finances in a simple ledger. This is not connected to the RU3A main or social account, but the Treasurer will be able to see the Group Ledger for reference. In some cases, a second Group Leader could be responsible for inputting group accounts having had training.



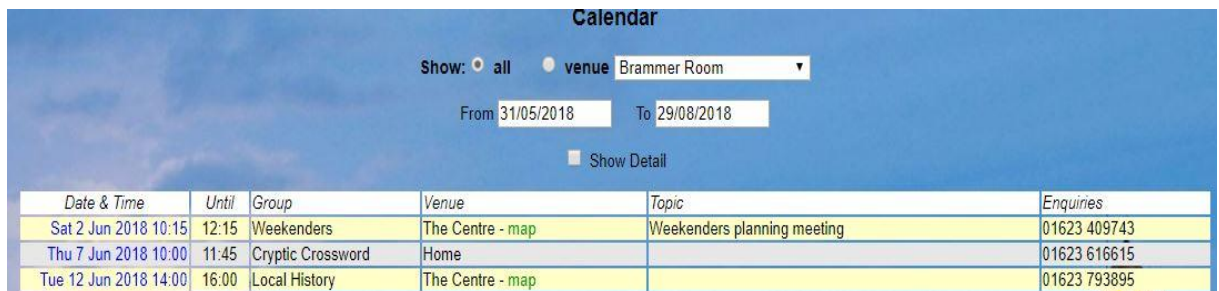
## D. Group Venues

The Group Venues page enables a view of each public venue of the RU3A. Clicking a venue shows more details.



## E. Calendar

The Calendar page shows forthcoming events with various options for selecting and viewing.



The screenshot shows a 'Calendar' interface with the following elements:

- Filter: Show:  all  venue Brammer Room
- Date Range: From 31/05/2018 To 29/08/2018
- Toggle:  Show Detail
- Table of events:

Date & Time	Until	Group	Venue	Topic	Enquiries
Sat 2 Jun 2018 10:15	12:15	Weekenders	The Centre - map	Weekenders planning meeting	01623 409743
Thu 7 Jun 2018 10:00	11:45	Cryptic Crossword	Home		01623 616615
Tue 12 Jun 2018 14:00	16:00	Local History	The Centre - map		01623 793895

## F. Personal Preferences



The screenshot shows the 'Personal Preferences' page with the following settings:

- Section: Drop-down name lists & Timeout
- Sort by:  Surname  Forenames
- Show:  Surname first  Forenames first
- Session timeout: 20 minutes
- Note: Minimise timeout if this is a shared computer (max 20 mins)
- Button: Save Name Lists & Timeout

Click Personal Preferences from the Home Screen to set the following preferences:

- Sorting of drop-down lists ('Surname' and 'Surname first' recommended)
- Timeout period
- Change your password
- Change your personal Q & A

**NOTE: when you have finished your Beacon session, go to the Home page and LOG OUT using the link next to your name.**

Please contact your trainer if you need further assistance

Name of trainer and contact details:

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(Or the RU3A Beacon Administrator Terry Moore : [tjmoore36@hotmail.com](mailto:tjmoore36@hotmail.com) )