Beacon User Guide

Updating your Group members Data

What is Beacon?

Beacon is Software used by many u3a to manage their membership, group and financial data.

What is the Groups data used for?

The data is used to identify the groups they attend. It allows our Groups Coordinator to understand what groups are thriving, who needs help and If the group leader resigns, who may be willing to take over the running of the group. The details of the data we hold are not shared with anyone outside our u3a.

Group Data can be split into three main parts:

Basic Group - information such as the Group name, when it meets and who the Organiser is.
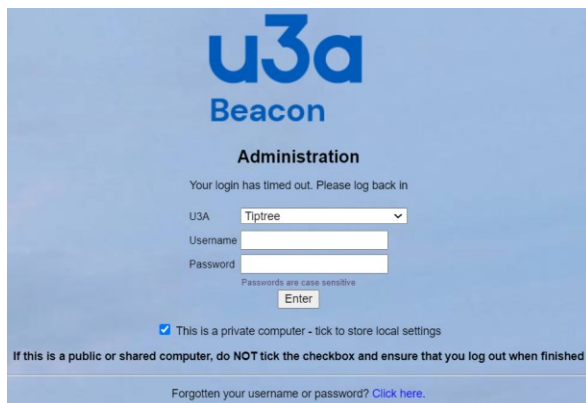
Group Members - (you maintain this) and who has signed up for the group.

Group Financial Data – You can use the Beacon to record your groups income and expenditure for your own records.

How do I access Beacon?

There is a specific URL that links to the Beacon portal, the link is here or copy this URL to your browser https://u3abeacon.org.uk/password.php

When you click on the link you will be presented with the following sign in page:

You will need to enter your log-on credentials to gain access to Beacon. Start by selecting Tiptree from the drop down list as shown above

Once you have entered your username and password, clicked on the "Enter" button. The next page to display is the menu page:
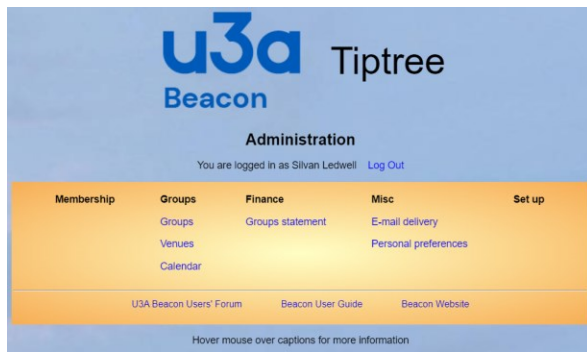
The first option under the heading "Groups" is the page that allows you to select the Group you are administering. You will notice that you only have access to the group that you organise. That group will be highlighted in blue as in the example below for the Ballroom group.
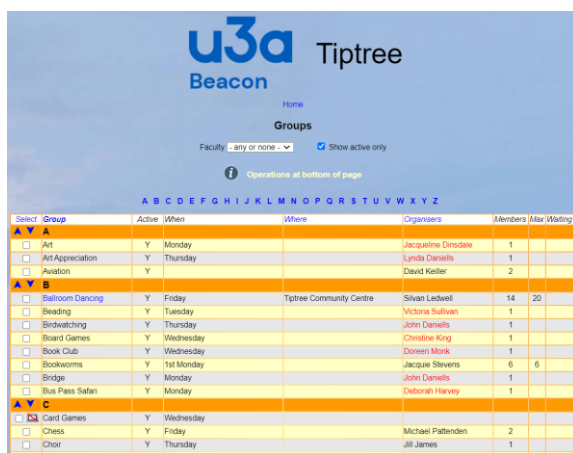
If you are the group organiser for more than one group, all groups will be highlighted.

Click on the group you are administering to open the next page that shows the basic details of the group.

1. Go back to the Home page

2. Shows the lists of groups
3. Shows the list of Venues used by Tiptree u3a
4. Schedule when your group runs
5. List of members, enables you to manage members of the group
6. Group finances.

Whenever you make changes tom the details of the group on this page, remember to click on the "Save Record" button.

Managing your Group Members

Choose option 5 "Members", to manage the members of your group.

When you open the page for the first time, you should be shown as the group leader. Beacon uses the term Group Leader, whereas Tiptree u3a use Group Organiser.

Below you can see an example of the group members page, please note this is demo data.

Select	Member No.	Name	Address	Telephone	Mobile	Status		
☐	1044	Jan Bradbury	122 Noname Street, Demoton, DM18 3UB	0123 456 1044	0707 456 1044	Lapsed	Leader	remove - cancel leader
	Emergency contact: Sue Brown 0707 456 1054							
Select	Member No.	Name	Address	Telephone	Mobile	Status		

Do with selected | Send E-mail ▾

1 members (0 selected)

Add member by name

- select member - ▾ | Add

Managing group members

Adding someone

Members can be added by using the dropdown list under the heading "Add member by name". Click on the "Select member" box to display a list of all Tiptree u3a members and either scroll down the list until you find someone in your group or type (quickly) the first few characters of a surname to find them. Then it's a simple as clicking on the person and they will be added to your group.

Remove someone

In the furthest column to the right of the page you will see the word "remove", simply click on that to remove someone from the group.

Change the Group Organiser

If you handover running the group to someone you can click on "cancel leader", and then click on "make reader" to assign the group to someone else.

If you do that, please hand over your log on details and let the Groups Coordinator know that the group has changed hands.