



Perth u3a Beacon

Group Leaders' User Guide

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1. Introduction

Beacon is an on-line application for managing u3a membership, finance and groups. It is accessed by username and password, allocated by a local U3A site administrator (details on the front cover).

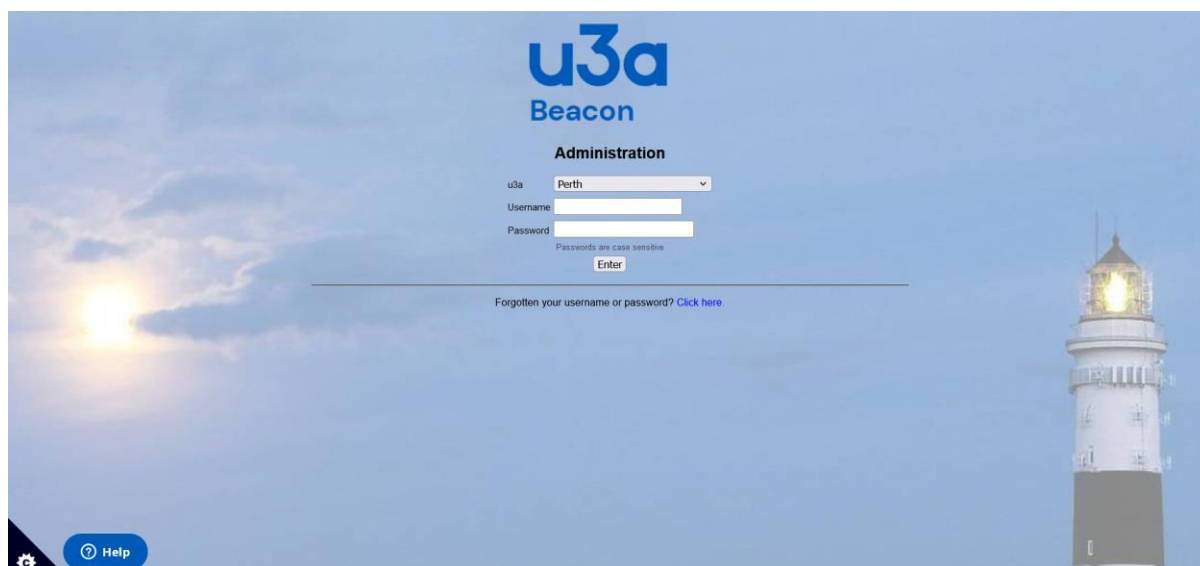
All u3as are co-hosted on the same server, with comprehensive security arrangements to ensure that the data of each u3a is effectively isolated from that of all others. Moreover, the encryption key used to encrypt sensitive data fields is different for every u3a.

The system is accessed by an internet browser and can therefore be used on most computers. Recommended browsers are Firefox and Chrome but other browsers are also generally compatible.

The internet address for Beacon is <https://u3abeacon.org.uk/password.php>

2. Logging In and Out

Click the link above to see the log-in page. Select the u3a you require (typing the first letter 'P' for Perth will take you there more quickly), enter your username and password, and press **Enter**.



You are allowed three attempts to log in. If the third try fails, another log-in attempt will not be accepted for 15 minutes. You can avoid this delay by closing and reopening your browser. If you continue to be unable to log in, ask for help from your system administrator who will confirm your username and reset your password (details on the front cover).

Usernames and passwords are case-sensitive. Make sure that you are not inadvertently using Caps Lock, and if you're copying and pasting your password, watch out for leading and trailing spaces. If you have not used the system before, or if your password has been reset by a system administrator, you will have to change your password at first use – see section 5.2 Changing your password.

If you have forgotten your username or password, use the **Click Here** link - see section 5.4 Recovering a forgotten username or password.

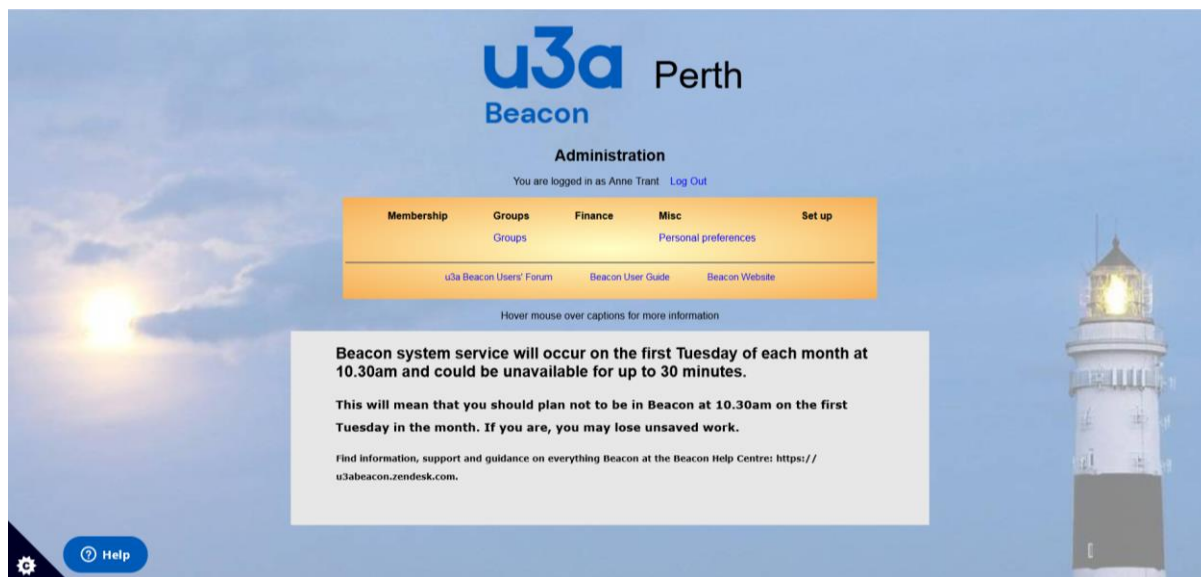
To log out, click **Log Out** (alongside your name) on the Home Page.

3. The Home Page

After log-in, you will find yourself on the Home page.

From any other page, you can get back to the Home page by clicking on the **Home** link at the top of the page.

Check for any site or system messages you haven't read before.



The operations are grouped under **Membership, Groups, Finance, Misc** and **Set up**. However, as you only see those operations to which you have access, some headings have no operations beneath them.

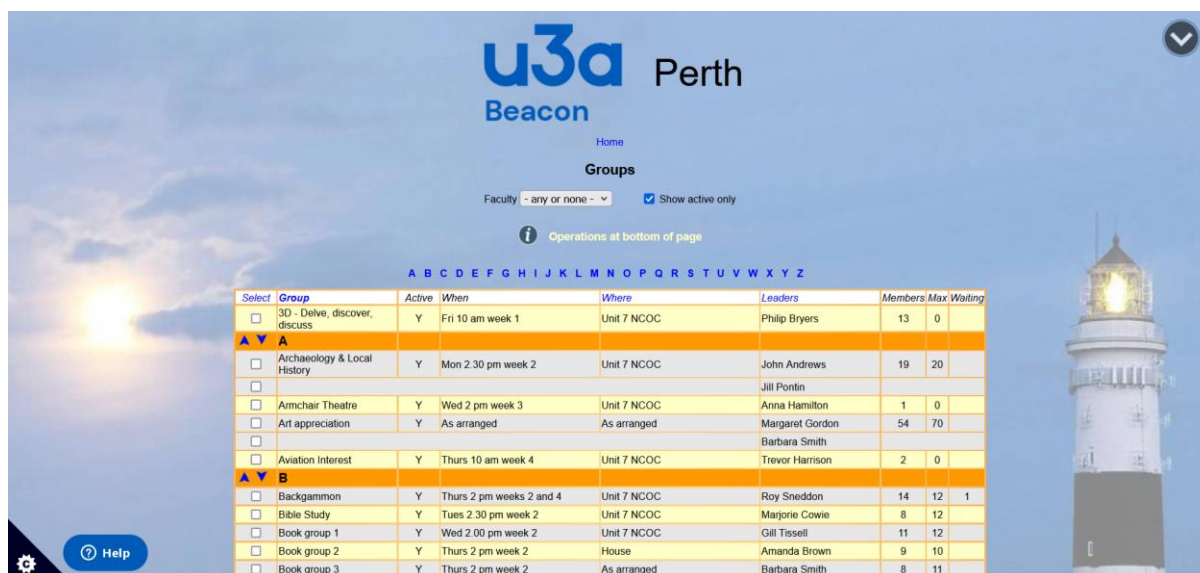
Throughout Beacon, operations, links and buttons will be hidden if you do not have sufficient access rights to use them. If you feel that you do not have sufficient access to do what you need to do, please contact your site administrator (details on the front cover).

As a group leader, you have access to **Groups** and **Personal preferences**. For more information about how to use these, see sections 4 and 5 of this guide respectively.

4. Working with Groups

4.1 Groups List

To show the list of groups, click **Groups** on the Home Page. The group(s) of which you are leader are highlighted in blue; these are the groups whose details you can edit.



Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
<input type="checkbox"/>	3D - Delve, discover, discuss	Y	Fri 10 am week 1	Unit 7 NCOC	Philip Bryers	13		0
A								
<input type="checkbox"/>	Archaeology & Local History	Y	Mon 2.30 pm week 2	Unit 7 NCOC	John Andrews	19	20	
<input type="checkbox"/>					Jill Pontin			
<input type="checkbox"/>	Armchair Theatre	Y	Wed 2 pm week 3	Unit 7 NCOC	Anna Hamilton	1		0
<input type="checkbox"/>	Art appreciation	Y	As arranged	As arranged	Margaret Gordon	54	70	
<input type="checkbox"/>					Barbara Smith			
<input type="checkbox"/>	Aviation Interest	Y	Thurs 10 am week 4	Unit 7 NCOC	Trevor Harrison	2		0
B								
<input type="checkbox"/>	Backgammon	Y	Thurs 2 pm weeks 2 and 4	Unit 7 NCOC	Roy Sneddon	14	12	1
<input type="checkbox"/>	Bible Study	Y	Tues 2.30 pm week 2	Unit 7 NCOC	Marjorie Cowie	8	12	
<input type="checkbox"/>	Book group 1	Y	Wed 2.00 pm week 2	Unit 7 NCOC	Gill Tissell	11	12	
<input type="checkbox"/>	Book group 2	Y	Thurs 2 pm week 2	House	Amanda Brown	9	10	
<input type="checkbox"/>	Book group 3	Y	Thurs 2 pm week 2	As arranged	Barbara Smith	8	11	

As well as basic information about every group, the current number of members in the group, the maximum number permitted and the number on the waiting list are shown. To see information about your group, click on the group name in the list.

Group information is shown on sub-pages: **Details**, **Schedule**, **Members** and **Ledger**. Perth u3a does **not** use **Schedule** nor **Ledger**. You can add data to **Schedule** and **Ledger**, but it's a waste of time as no-one except you will see it.

4.2 Group Details

This sub-page (see page 6) shows information about the group. Many of the data fields are not used by Perth u3a, and therefore some of the onscreen help text is not relevant, in particular comments about text being used in publicity or information being used to help enquirers.

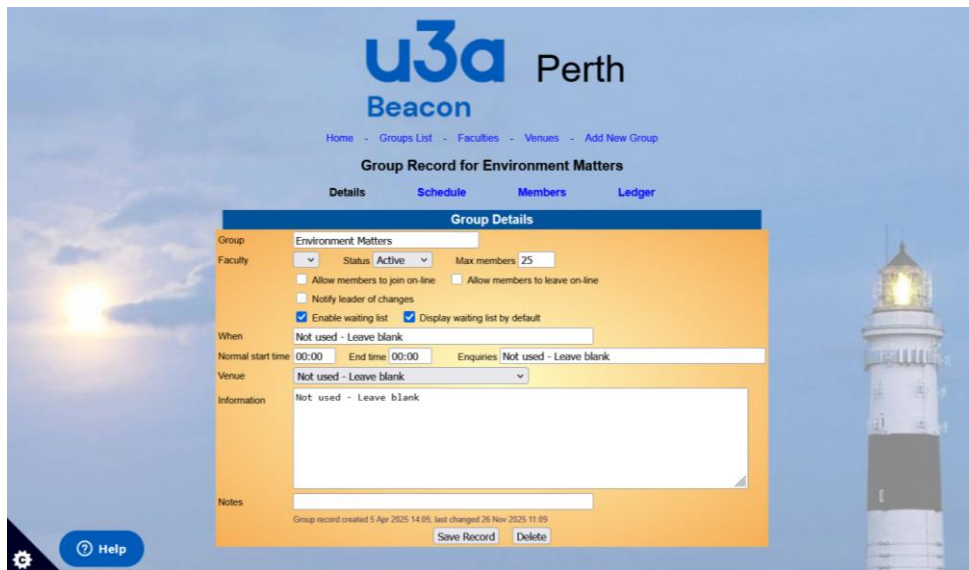
Faculty is not used by Perth u3a.

Status records whether the group is Active or Inactive.

When, **Start time**, **End time** and **Venue** are not used by Perth u3a. When and Venue should read Not used – Leave blank. Start time and End time are both set to 00:00.

The **Contact** field is not used by Perth u3a, and should read Not used – Leave blank.

The **Information** field is not used by Perth u3a, and should read Not used – Leave blank.



Max members is decided by the group leader. If the maximum number you want in the group is entered, a waiting list can be managed using Beacon. The number may depend, for example, on how many the venue can accommodate or relate to how the group works best. This feature operates whether or not **Enable waiting list** is ticked.

Perth u3a does not use **Allow members to join on-line** and **Notify leader of changes**.

The **Notes** field can be used for any additional information – this information is not published.

Press **Save record** to save any changes you've made.

4.4 Group Members

This sub-page (see page 7) enables actions relating to group members, for example, managing a waiting list or sending an email.

To add new members to the group

Scroll past the list of names. New members can be added either by selecting a member's name under **Add member by name**, or by entering the member's membership number under **Add member by membership number**.

When a member is added by name, their address is shown for confirmation.

Press **Add** to add the selected member.

To remove members from the group

To remove a member, click **Remove** at the end of the member's row in the list of Group Members.

u3a Beacon Perth Demo22

Home - Groups List

Group Record for Map Reading

Details Schedule Members Ledger

Joined members Waiting list

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	
<input type="checkbox"/>	1003	Neil Armstrong	1 Access Avenue, Demoton, DM11 1PB	0123 456 1006	0707 456 1006	Current		remove - make leader
Emergency contact: Albert Atheist 0707 456 1016								
<input type="checkbox"/>	1007	Alexander Bell	199 The Broadway, Near Little London, North Demoton, DM7 2TA	0123 456 1032	0707 456 1032	Current	25-Aug-24	remove - join group
<input type="checkbox"/>	1031	Tam O'Shanter	10 Burns Street, Demoton, DM5 9YG	0123 456 1181	0707 456 1185	Current	12-Mar-24	remove - join group
Emergency contact: Kathryn Ollerenshaw 0707 456 1184								
<input type="checkbox"/>	1035	Eva Peron	10 The Low Street, Demoton, DM1 2FT	0123 456 1193	0707 456 1193	Current		remove - make leader
Emergency contact: Jenny Ripper 0707 456 1203								
<input type="checkbox"/>	1036	Jackson Pollock	HSBC The Square, Demoton Village, DM12 4RR	0123 456 1208	0707 456 1208	Current		remove - make leader
Emergency contact: Chris Smith 0707 456 1218								
<input type="checkbox"/>	1038	Betty Rubble	Cave Rock Street, Demoton, DM1 2BC	0123 456 1209	0707 456 1210	Current		remove - make leader
Emergency contact: Barney Rubble 0707 456 1209								
<input type="checkbox"/>	1065	Ernest Shackleton	The Ice House, 99 South Georgia Lane, Lower Demoton, DM4 9RA	0123456 1065	0707 456 1065	Current	25-Aug-24	remove - join group
<input type="checkbox"/>	1041	Sylvia Tolkein	Flat 4, 22 Swallow Lane, Demoton, DM9 6DW	0123 456 1237	0707 456 1237	Current	Leader	remove - cancel leader
Emergency contact: Percy Wainwright 0707 456 1247								

Help with selected Send E-mail

8 members (0 selected)

To manage a waiting list

Above the list of names are buttons which enable joined members or members on the waiting list to be displayed separately. This is useful if you want to email full group members only.

If the number of members exceeds the maximum number given on the Details sub-page, Beacon adds the extra members to the waiting list. It includes the date on which they were added so that, if a place become available, you can invite members to join on a first come, first served basis. Choose the person who's been waiting longest and click **Join group** at the end of the line with their name.

After registration Day, you may have several members on your waiting list with the same date against them. You could use the Notes field on the Group Details sub-page to record the order to admit them in.

To send an e-mail to group members

If you want to send only to full members, unclick 'Waiting list'. Select the individual members you want to email using the checkboxes or use the Select column header to **Select all**. Select **Send E-mail** from the drop-down list at the bottom of the list of members, then press **Do with selected**. An e-mail form will be displayed.

The **From** address is normally taken from your member record. However, if you have asked to use a different e-mail address as a committee member or group leader, this additional address is shown and is the default. You should select the address that you want to use.

The list of addressees displayed is for information only; they cannot be changed here. To change the list, return to the Group Members list and correct the selection there.

Tick **Tick to receive copy** if you want to receive a copy of the message (always a good idea).

If you wish to send one or more attachments with the message, press the button next to **Attachments** (the format will vary between browsers) and select each file in turn. The files will be listed under the button. To remove any file, click on the small **x** before the filename.

Note: Many e-mail servers impose limits on the number or size of attachments that recipients can receive. It is wise, therefore, not to send more than a few attachments with any one message and to minimise attachment size.

Enter a **Subject** for your message and then your message below.

You can personalise your message by inserting into the subject or message text any of the # tokens shown on the right. When the message is sent, these tokens will be replaced by the corresponding information for the member to whom the message is being sent.

Press **Send** to send the message. All messages are sent to recipients individually. No recipient can see who else is receiving the message. It is therefore helpful to identify at the top of your message who the email is being sent to, for example, to all members of the Map Reading group or to all Committee Members.

To download a spreadsheet of group members

If you want to include only full members, unclick 'Waiting list'. Select the individual members you want to include using the checkboxes or use the Select column header to **Select all**. Select **Download Excel** in the drop-down list at the end of the list of members and then press **Do with selected**. You will then be asked which fields to include in the spreadsheet.

Choose the fields you want to include. For a register of attendance, you'll probably want names only but walking groups, for example, might find it useful to add phone numbers and emergency contacts. Download and save the spreadsheet locally. Head spare columns with the dates of your meetings and save/print the register. Gridlines make it easier to tick the right box for the member and the date. You can add gridlines by clicking Page layout, then ticking the box under Sheet options for Print gridlines.

To download a PDF file of group members

Select the members to include using the checkboxes or the **Select** column header menu. Select **Download PDF** in the drop-down list at the end of the list of members, then press **Do with selected**. You will then be asked which fields to include in the document.

5. Personal Preferences

Click **Personal preferences** on the Home Page. The preferences set here apply to the current computer or current user only.

5.1 Drop-down name lists and Timeout

The appearance and sort order of drop-down lists may be changed to suit personal preference.

It can be an advantage to show the surname first as it allows any given surname to be located quickly by typing its first letter. The list then jumps to the first surname starting with this letter.

This choice does not apply to other types of list.

When Beacon has been inactive for a period of time, you are required to login again. This is an important security precaution to reduce the likelihood of someone else using your computer after you have logged in and then left the machine.

By default, Beacon times out after 20 minutes and you should not make the delay longer on a shared machine (it would be better to reduce it). However, if you find this period inconvenient on a computer to which no-one else has access, you may change the **Session timeout** duration here.

Press **Save Name Lists & Timeout** to save these settings which applies to any user of the current computer.

5.2 Changing your password

To change your password, enter a **New password** and then **Confirm**. Follow the guidance given about password requirements. Press **Change Password** to bring the new password into effect.

5.3 Changing your personal question and answer

You can change your personal question and answer which may be used to verify your identity. . You can accept the default **Question** or change it to something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else. Press **Update Q&A** to store the new phrases.

5.4 Recovering a forgotten username or password

If you have forgotten your username or password, you may be able to recover it. Use the **Click here** link on the log-in page and complete the requested information. Then press **Submit**.

If you are able to be identified, you will then be asked the answer to your personal question. Make sure that you type this in the same format as when it was originally set. If your answer is correct, you will be sent an e-mail with your username and a new temporary password, which will need to be changed at first log-in.

If this procedure fails, seek the assistance of your site administrator (details on the front cover.)

5.5 Temporary passwords

All users are initially assigned temporary passwords. A temporary password is also assigned if your password has to be reset for any reason. Temporary passwords must be changed the first time you log in to a password you choose yourself. In this way no-one should know your password except you.

After logging in with a temporary password, the **Password Change** page is shown.

Enter a **New Password** and **Confirm** by entering it again. Abide by the guidance given as to the requirements for passwords.

Then enter a **personal question and answer**. You may answer the default question or you may replace this with something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else.

Press **Submit** to save your new password and Q&A.

6. Beacon Usage Hints and Tips

6.1 Links and buttons

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 browser tab. This is a useful facility and can be used to look up or edit other information without closing the current page.

If you are unsure what a link or button does, hover the mouse over it and a tooltip will often give you an explanation. After a while tooltips close themselves. You can speed this up by clicking on an empty part of the page.

6.2 Page layout

Links appear at the top of all pages (except the home page) and at the bottom of longer pages. Clicking one of these links takes you to a different page.

Filters to change the data you see are usually near the top of a page, under the links.

Operations on the current page are carried out using buttons near the end of the page, sometimes integrated into the end of a list.

6.3 Drop-down lists

If a drop-down list is long, you can jump quickly to the first entry starting with any particular letter by clicking on the list and then pressing the letter on the keyboard.

Successive presses of the same letter will step through the list one entry at a time. This can sometimes be quicker than scrolling through the list.

6.4 Back button

It's best **not** to use the back button of your browser to revisit the previous page you were on. The back button is usually a left-pointing arrow at the top left of your screen. Pressing it is likely to take you somewhere unexpected and could be confusing. It's better to use the blue underlined links to navigate from one page to another.