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These notes have been produced to assist Leaders who use the Beacon management system and attended the Leaders Guide To Beacon Workshop.

Beacon Users are also advised to use the blue "Help" icon which sits bottom left on all the Beacon screens, this is very informative. If you require further assistance do not hesitate to contact your Beacon Administrator by email jprettybeacon@gmail.com or speak to me at one of the Members Meetings.

John Pretty
Beacon Administrator
Hucknall & District u3a

Logging On To The System

Login to the administration part of Beacon.

<https://u3abeacon.org.uk>

New User

Contact the Beacon administrator with a request to be set up as a system user.

The Beacon Administrator will set you up as a Beacon System User and send you an email which informs you of your username and password for example 'smithj' 'abcd&1234'

You will be prompted to change the password when you log onto the system for the first time.

Login Screen

In the u3a field select 'Hucknall & District'. Then use your group leader's 'username' and 'password'. And finally, press 'Enter'.

If you have forgotten your password, use 'Click here' to reset your password.

IMPORTANT NOTE

- Do not share your password
- Keep it secret
- Do not log in to Beacon on a public internet

User Tip:

If you 'accept optional cookies' by clicking on the white cog icon which has a 'c' in the centre, which can be found bottom left of the login screen, the u3a field will be automatically filled with 'Hucknall and District' branch name on subsequent visits.

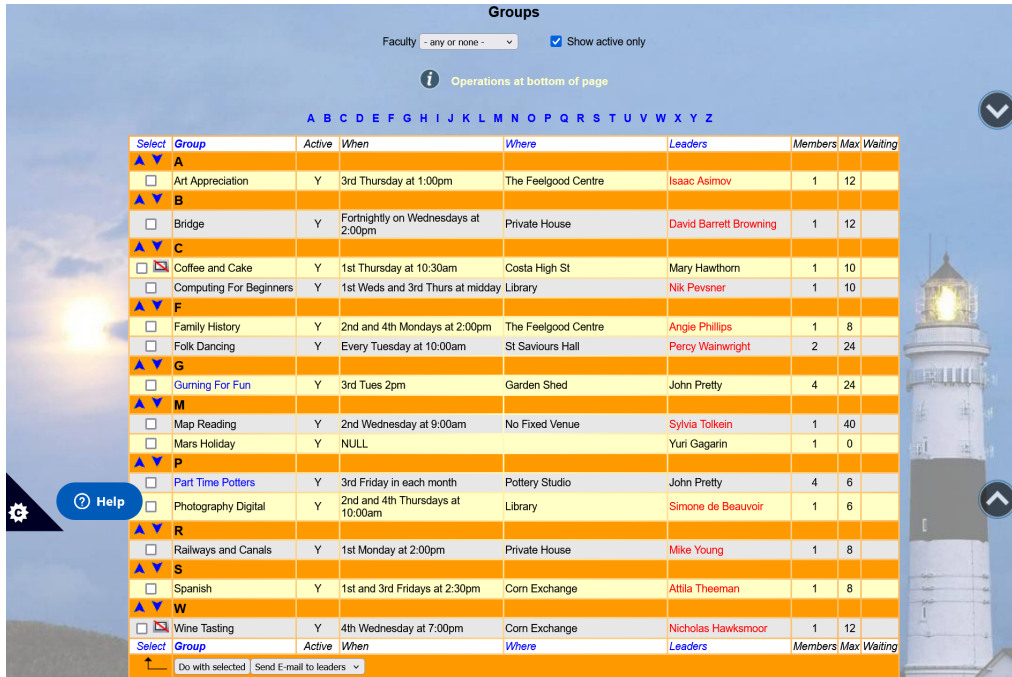
After Logging In

The new page offers you a number of group management options:

The screenshot shows the 'Administration' page of the u3a Beacon system. At the top, it displays the u3a Beacon logo and the text 'Hucknall Demo 22'. Below this, it indicates the user is logged in as 'John Pretty' and provides a 'Log Out' link. The main content area is divided into several sections: 'Membership', 'Groups', 'Finance', 'Misc', and 'Set up'. The 'Groups' section includes links for 'Groups', 'Venues', 'Faculties', and 'Calendar'. The 'Finance' section has a link for 'Ledger (by group)'. The 'Misc' section has a link for 'Personal preferences'. Below these sections, there are links for 'u3a Beacon Users' Forum', 'Beacon User Guide', and 'Beacon Website'. The 'Public website links' section includes 'Join Hucknall Demo 22 u3a now!', 'Members Portal', 'Public groups list', and 'Public calendar'. The 'Documents' section has a link for 'Documentation for prospective Beacon users'. At the bottom, there is a note: 'Hover mouse over captions for more information'.

Groups/Venues/Faculties/Calendar/Ledger(by Group)/Personal Preferences

The first step is to select your group from the list of groups:



Scroll down the alphabetical list until you find your group and click on it. The Group Details page appears, which allows you to edit the group details:

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
<input type="checkbox"/>	Gurning For Fun	Y	3rd Tues 2pm	Garden Shed	John Pretty	4	24	
<input type="checkbox"/>	M							
<input type="checkbox"/>	Map Reading	Y	2nd Wednesday at 9:00am	No Fixed Venue	Sylvia Tolkein	1	40	
<input type="checkbox"/>	Mars Holiday	Y	NULL		Yuri Gagarin	1	0	
<input type="checkbox"/>	P							
<input type="checkbox"/>	Part Time Potters	Y	3rd Friday in each month	Pottery Studio	John Pretty	4	6	
<input type="checkbox"/>	Photography Digital	Y	2nd and 4th Thursdays at 10:00am	Library	Simone de Beauvoir	1	6	
<input type="checkbox"/>	R							
<input type="checkbox"/>	Railways and Canals	Y	1st Monday at 2:00pm	Private House	Mike Young	1	8	
<input type="checkbox"/>	S							
<input type="checkbox"/>	Spanish	Y	1st and 3rd Fridays at 2:30pm	Corn Exchange	Attila Theeman	1	8	

Click on your group to open the Group Details page.

You can change any of the fields here, including your group name.

The screenshot displays the 'Group Record for Part Time Potters' page on the u3a Beacon website. The page features a blue header with the u3a Beacon logo and the group name 'Hucknall Demo 22'. Below the header, there are navigation links: Home - Groups List - Faculties - Venues. The main title is 'Group Record for Part Time Potters', with tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Details' tab is active, showing a form with the following fields:

- Group: Part Time Potters
- Faculty: Arts and Literature (dropdown)
- Status: Active (dropdown)
- Max members: 6
- Allow members to join on-line:
- Enable waiting list:
- Notify leader of changes:
- When: 3rd Friday in each month
- Normal start time: 14:00
- End time: 16:30
- Contact: potters@hucknallu3a.org.co
- Venue: Pottery Studio (dropdown)
- Information: Pottery sessions at the Studio.
- Notes: (empty text area)

At the bottom of the form, it states 'Group record created 8 Aug 2024 19:47; last changed 8 Aug 2024 19:51' and includes 'Save Record' and 'Delete' buttons.

In addition, you have the following options:

- Schedule
- Members
- Ledger

Members

Beacon
Home - Groups List
Group Record for Part Time Potters
Details Schedule Members Ledger
 Joined members Waiting list

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	
<input type="checkbox"/>	1071	Archie Clay	The Studio Potter St, Hucknall, NG15 1AB		0123345678	Current		remove - make leader
Emergency contact: 0123456789								
<input type="checkbox"/>	1072	Clarrie Cliff	12 Cliff Edge, Hucknall, NG15 3TY		01234 567891	Current		remove - make leader
Emergency contact: 01234 567891								
<input type="checkbox"/>	1073	Gray Perry	2 Glade View, Hucknall, NG15 8QW		01234 567891	Current		remove - make leader
<input type="checkbox"/>	1067	John Pretty	123 Dead End St, HappyTown, NG99 9XZ			Current	Leader	remove - cancel leader
Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	

Do with selected Send E-mail

4 members (0 selected)

Add member by name
- select member - Add

Add member by membership number
Separate numbers by commas
Add

Home - Groups List
Help

Here you should manage the members of your group.

Remove a member by clicking on 'remove' in the last column.

Confirm

Do you really want to remove this member?

Cancel Remove

4 members (0 selected)

Make a leader by clicking on 'make leader' or cancel leader by clicking on 'cancel leader'.

Adding a new member to your group

The screenshot shows a web interface for adding members. It has two main sections. The top section is titled 'Add member by name' and contains a dropdown menu with the text '- select member -' and a small downward arrow, followed by an 'Add' button. The bottom section is titled 'Add member by membership number' and contains a text input field, the instruction 'Separate numbers by commas', and an 'Add' button.

- You can add a member by selecting his/her name from the 'Add member by name' drop down list,
- Entering his/her membership number in the 'Add member by membership number' field.
- You can add multiple entries by separating the membership numbers by a coma.
- Please make sure that the membership of your group is kept up-to-date!

Sending an email to members

To email group members, select them all by clicking all boxes on the left of 'member number'. Ensure the box at the bottom says 'send email' and then click 'Do with selected'.

Group Members			
Select	Member No.	Name	Address
<input checked="" type="checkbox"/>	1071	Archie Clay	The Studio Potter St, Hucknall, NG15 1AB
Emergency contact: 0123456789			
<input checked="" type="checkbox"/>	1072	Clarrie Cliff	12 Cliff Edge, Hucknall, NG15 3TY
Emergency contact: 01234 567891			
<input checked="" type="checkbox"/>	1073	Gray Perry	2 Glade View, Hucknall, NG15 8QW
<input type="checkbox"/>	1067	John Pretty	123 Dead End St, HappyTown, NG99 9XZ
Select	Member No.	Name	Address
<input type="button" value="Do with selected"/> <input type="button" value="Send E-mail"/>			

4 members (3)

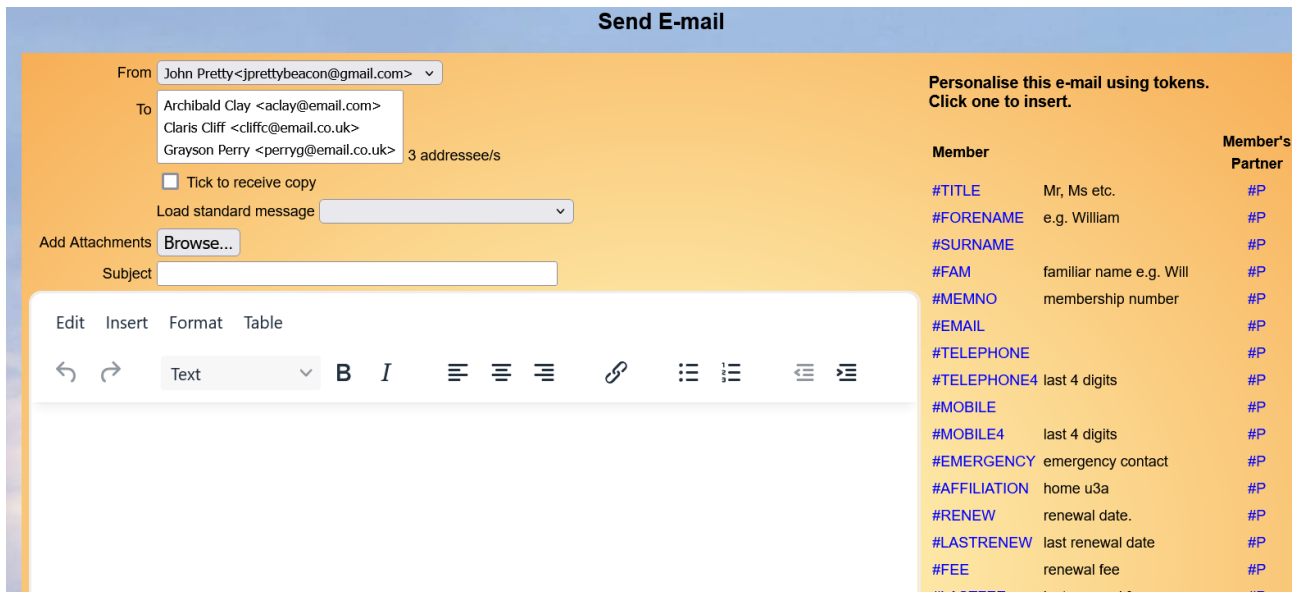
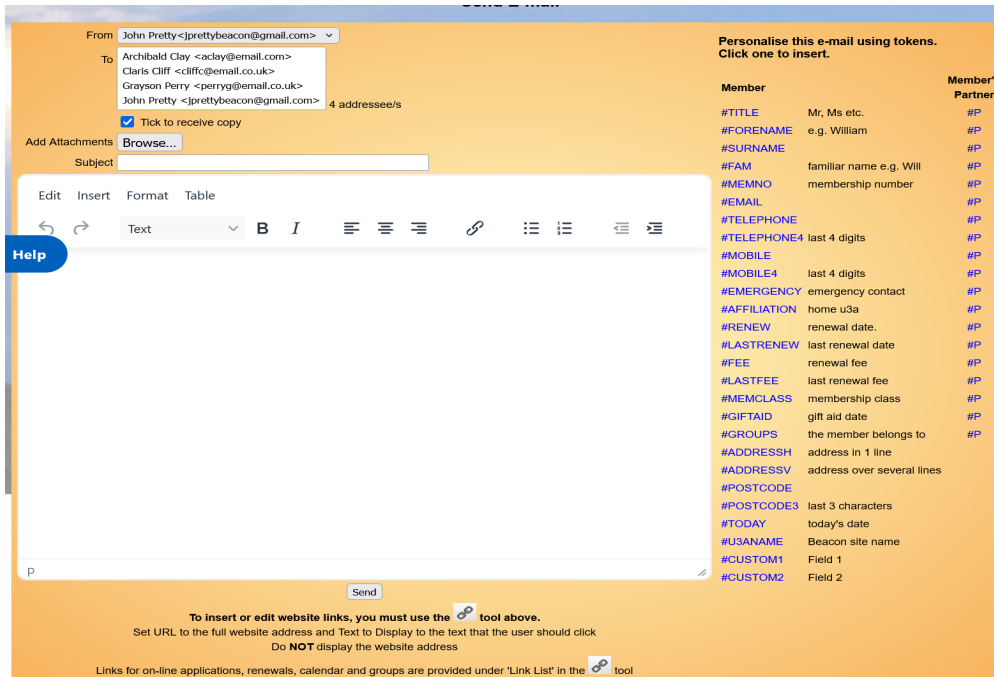
Tip to select every name. Mouse over 'Select' this shows a dialogue box. 'Click to display selection menu.' Click and the following menu is displayed.

- Select All
- Clear All
- E-mail Only
- Without E-mail

Select All will place a tick against every member's name. E-mail Only will select all members with an E-mail address. Without E-mail selects all members who do not have an e-mail address. If you click on a blue tick it will remove the tick.

Ensure that 'Send E-mail' is showing then click on 'Do with selected'

This will open the E-mail screen.



- 'From'. This should be your email address. If more than one is listed, please select the correct one.
- 'To', the list of addressees. It should contain the list you selected earlier.
- Check the 'Tick to receive a copy' check box if you wish to receive a copy of this e-mail.

- Remember to include a clear Subject. This helps to identify your email in the recipient's Inbox.
- The white field below allows you to write and format your email. The top line ('Edit', 'Insert', 'Format', and 'Table') offers you some useful features. Click on them to learn what they do, they are self-explanatory.
- Underneath are 13 mostly formatting icons. The 'Text' drop-down menu allows you to select headings of various sizes.

Personalise Your Email

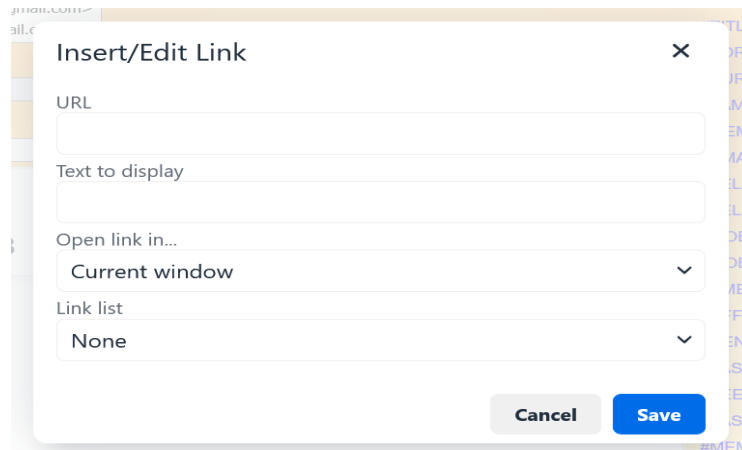
- You can personalise your email by clicking on any of the *tokens* in the right column. For example, 'Dear #FORENAME' will ensure that each email is addressed directly to each recipient, despite being sent to multiple members. You can achieve this, for example, by typing 'Dear ' (with a space at the end) and then clicking on the '#FORENAME' blue button. You may use '#FAM' to address the recipient in a more familiar way. If the member did not specify his/her familiar name, '#FAM' will default to the '#FORENAME'.
- Finally, when you are finished and are happy with your email, press the 'Send' button at the bottom.

Attaching Files to E-mail

- Click on 'Browse' by the Add Attachments label to choose the file(s) to attach to your E-mail.
- The 'Browse' box may be replaced by a 'Choose Files' button when using some types of tablet or smart phone.
- It is recommended that attached files don't have long names or names that contain special characters such as brackets because these can sometimes cause delivery problems.
- There is no practical limit to the number of attachments you can send with Beacon, but many email 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. Also, to reduce the likelihood of emails being flagged as spam, it is recommended that attachments are not used when sending to a large number of recipients (over 50).
- There is an absolute total limit of 20MB that can be uploaded. If this is exceeded the error message is "413 Request Entity Too Large".
- Clicking on the 'x' at the side of the attachment will remove it from the email.

Inserting a Web Link into E-mail

- To put a link in your email use the 'link icon'. It is the ninth icon. It opens the 'Insert/Edit Link window' dialogue box: Or 'Insert' then 'Link'



- A form will open that allows you to enter the URL and also 'Text to display' where you can add a suitable description or title.
- Click on 'Save' to add the link.

Replies From Recipients

It is important to realise that software on laptops, tablets and smart phones present email in different ways. What appears will also depend on whether the recipient has an address book entry with the senders name and email address.

However copying the 'From:<name/email address>' field and pasting this into a 'To:<name/email address>' field to reply always results in the return email being sent to noreply@u3abeacon.org.uk. This will not be delivered.

To avoid any confusion it is advisable to include a 'Reply To: <your email address>' in your text.

Facts about sending an email from Beacon

- Beacon emails are delivered by SendGrid, a specialist email service provider.
- Beacon sends your email to group members in a GDPR compliant way. (That is *bcc*, or one member does not see the email address of any other member.)
- As Beacon does not store sent emails, it is advisable that you click on the '**Tick**

to receive copy' check box before pressing the Send button.

- It is advisable to personalize the email by using, for example 'Dear #FAM'. When an Internet Service Provider sees a large number of identical emails (for example, 'Dear Member') its antispam software may categorize these emails as spam.
- The *total* size of files you attach with your email should not exceed 20 MB. Be aware that some email providers impose a lower limit on receiving emails.
- Note that your Beacon session will time out after a certain time of inactivity. If you have an unsent email, it will be lost. You can set *session timeout* in the [Personal Preferences](#). The default is 20 minutes.

Standard messages and Message templates

- You as a group leader can create standard messages for your group which you can save and re-use as required.
- First select the people you want to contact. Write your email and then click on 'Save as standard message'.
- You will be asked to provide a name for the message. Please use the following format:
- Your initials – group name – message name e.g. *jsp-beginnersukulele-nextmtg*
- You can edit the message and re-save it if required. You cannot delete messages.

Schedule: Creating group events

You should use the 'Schedule', to the left of 'Members' to add information about future meetings. You will get a screen showing no upcoming events if you have not added any events.

The screenshot shows a web interface for managing a group's schedule. At the top, there are navigation links: Home - Groups List - Calendar. The main heading is 'Group Record for Part Time Potters'. Below this are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Schedule' tab is active, showing a table with columns for 'Date & Time', 'Until', 'Venue', 'Topic', and 'Enquiries'. The table lists several events, all occurring at 'Pottery Studio - map' at 14:00 on Fridays. Below the table is an 'Add Events' form with fields for 'First date and time', 'then every' (with a dropdown for 'Weeks'), 'Number of events', 'End time', 'Venue', 'Enquiries', and 'Topic'. A 'Help' button is visible on the left, and an 'Add Events' button is at the bottom of the form.

You can add an individual event by selecting the date. Leave 'Number of events' as 1. Click 'Add Events' to save your meetings.

You can add a series of events that occur at regular intervals, such as every week, every two weeks, 1st Monday etc, and then choose the appropriate interval. When you click 'Add Events', you will see your events listed above. If the events occur at irregular times, then they should be added individually. Events will disappear from the calendar when the date is past.

When someone selects 'Calendar' in the Beacon Members Portal, they will see information about upcoming meetings for individual groups.

The screenshot shows the u3a Beacon website interface. At the top left is the u3a logo and 'Hucknall & District Beacon'. Navigation links include 'Return to Hucknall & District u3a' and 'Members Portal'. The main heading is 'Hucknall & District u3a Calendar'. Below this is a filter section with 'Show: All Group' and a radio button for 'Own groups and general meetings'. The calendar lists several events, with the first one highlighted in orange: 'Mon 19 Aug 2024 10.00 am Beginners & Improvers Ukulele'. A detailed view for this event shows the venue as 'John Godber Centre - map' and contact information 'jprettybeacon@gmail.com'. Other events listed are for 'Mon 2 Sep 2024 10.00 am', 'Mon 16 Sep 2024 10.00 am', and 'Mon 30 Sep 2024 10.00 am', all for 'Beginners & Improvers Ukulele'. A 'Download' button is located at the bottom of the calendar view.

Ledger

Select Groups *-(Select your group from list)-Ledger*

[Home](#) - [Groups List](#)

Group Record for Part Time Potters

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

Group Ledger

From to

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£0.00	
Date	Payee	Detail	In	Out	Balance	

Add transaction

Date	Payee	Detail	In	Out
10/08/2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Home](#) - [Groups List](#)

Enter details of transactions.

[Home](#) - [Groups List](#)

Group Record for Part Time Potters

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

Group Ledger

From to

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£0.00	
10 Aug 2024	John	Monthly Subscription	£50.00		£50.00	edit - delete
10 Aug 2024	John	Archie Subs	£10.00		£60.00	edit - delete
10 Aug 2024	John	Clarie Subs	£10.00		£70.00	edit - delete
10 Aug 2024	John	Gray Subs	£10.00		£80.00	edit - delete
12 Aug 2024	Craft Shop	Purchase Clay		£30.00	£50.00	edit - delete
13 Aug 2024	u3a Treasurer	Cost of Studio Hire		£40.00	£10.00	edit - delete
Date	Payee	Detail	In	Out	Balance	

Add transaction

Date	Payee	Detail	In	Out
10/08/2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

This is not linked to the u3a Group Finances it is a simple record of transactions.

Personal Preferences

This page allows you to set your personal preferences when working with Beacon as a group leader.

Personal Preferences

Drop-down name lists & Timeout

Sort by Surname Forenames

Show Surname first Forenames first

Session timeout minutes

Minimise timeout if this is a shared computer (max 20 mins)

Change password for John Pretty

Passwords should comprise minimum 10 characters with no spaces 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: ! @ # \$ % ^ & *

Old password

New password

Confirm

Change personal Q&A for John Pretty

Question

Answer

Data Protection

Personal data' means any information relating to identifiable person, Name, Address, Email Address, Telephone number etc.

1. Personal data **must only** be used for u3a business to contact members concerning u3a business.
2. Data disclosed outside the u3a organisation must be limited to essential data and disclosed **only with the owners permission**.
3. Passwords must be kept securely and secretly and not shared.
4. Ensure that personal computers are free from virus and malware by using appropriate virus protection software.
5. Computer files containing personal data should be password protected and encrypted.
6. If there is a data breach report it to the u3a Committee Officials immediately.

Why Use The Beacon System?

- Personal data is secure and encrypted.
- Details of group meetings are there for all Group Members to see via the Portal.
- E-mail to Group Members are sent securely without disclosing everyone's email addresses.
- E-mail with attachments and/or links are less likely to be blocked.
- Co Leaders and Helpers have access, it is easier for them to lend a hand or take over.
- Transactions can be entered on the Group Ledger by leaders and/or co-leaders.
- Passing on Leadership is made easier.

