



Beacon User Guide

for Bicester u3a Group Leaders

This guide is for the use of Bicester u3a Group Leaders who are new to the Beacon database system.

It consists of step by step screen shots of the login method and how to access your group. Every screenshot is shown as you will see it when you log into Beacon, using the Username and Password sent to you by the Bicester u3a Beacon System Administrator.

To go your actual group, go to the Beacon logon screen, by clicking here [U3A Administration \(u3abeacon.org.uk\)](https://u3abeacon.org.uk) or enter the web address into your Browser.

Follow the written instructions that are superimposed on the screen shots in this guide.

Please note: Members' personal details have been blanked out in this guide to comply with Data Protection Regulations.

If you have any queries, please contact Bicester u3a Beacon Administrator at: -Beacon@u3aBicester.online

Contents

- Logging in -----Page 2 Figures 1 to3
- Access your group-----Page 3 Figures 4 to 6
- Find your 'members'-----Page 5 Figures7 to 8
- Add Members-----Page 6 Figure 9
- Sending emails-----Page 6 Figures 10 to 13
- Other group records, finances etc-----Page 8 and 9 Figure 14
- Background of the Beacon system-----Page 10

LOGIN SCREEN

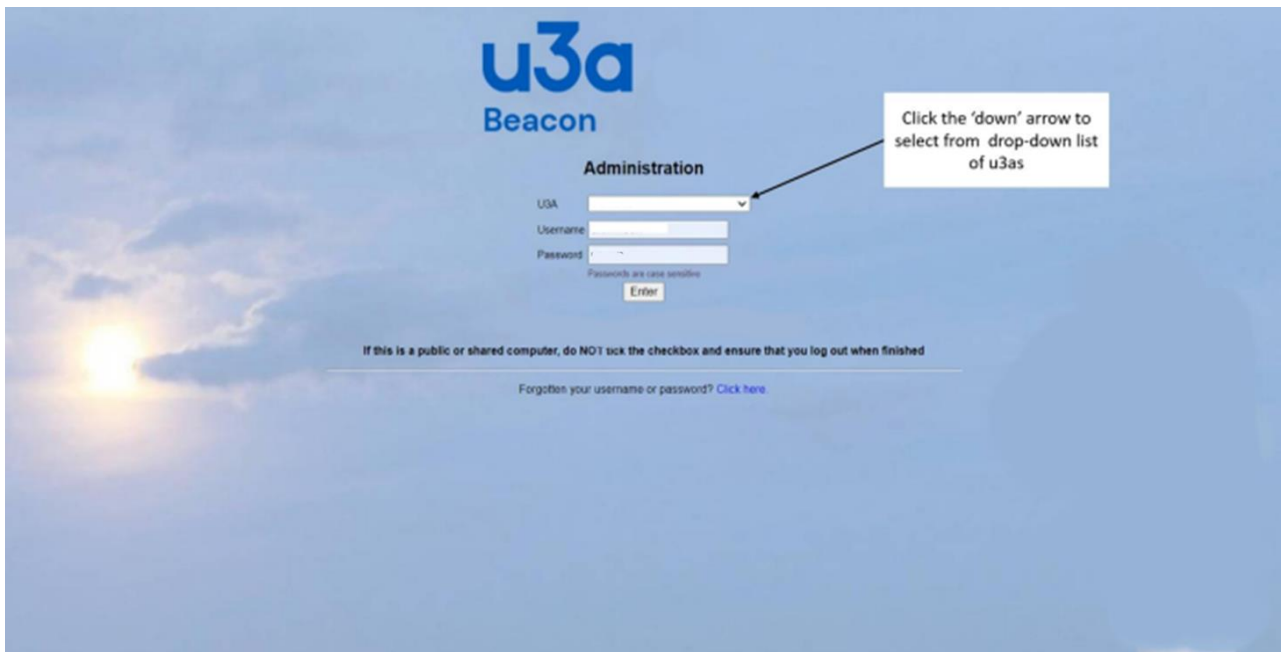


Figure 1.

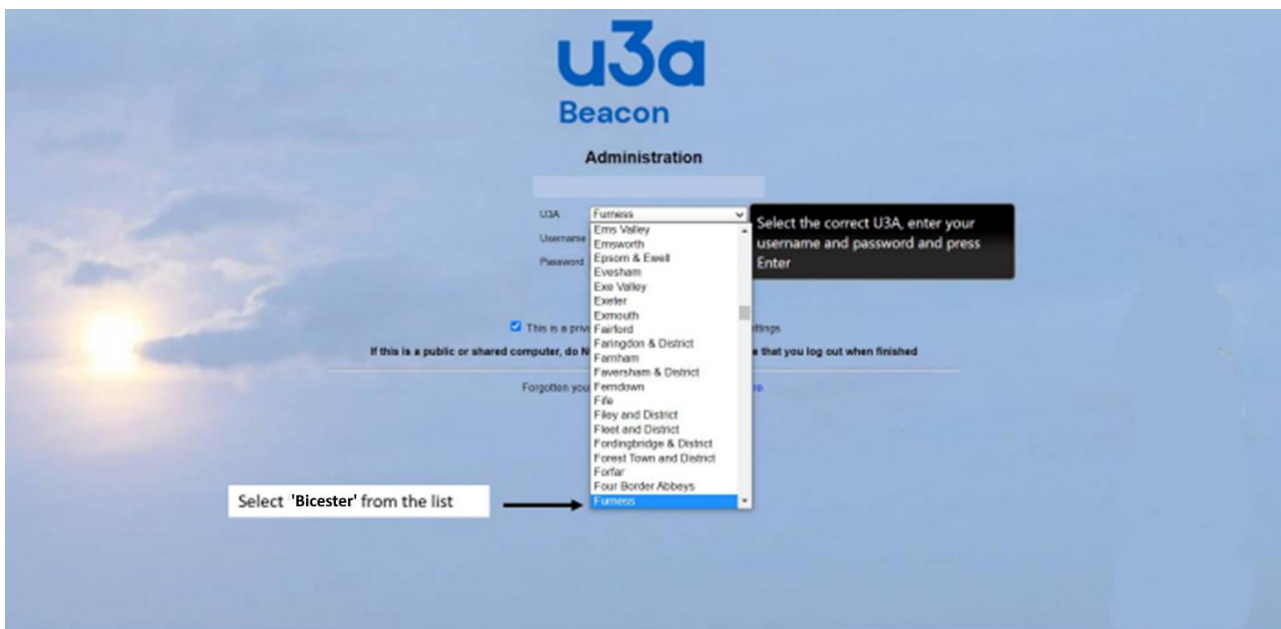


Figure 2.

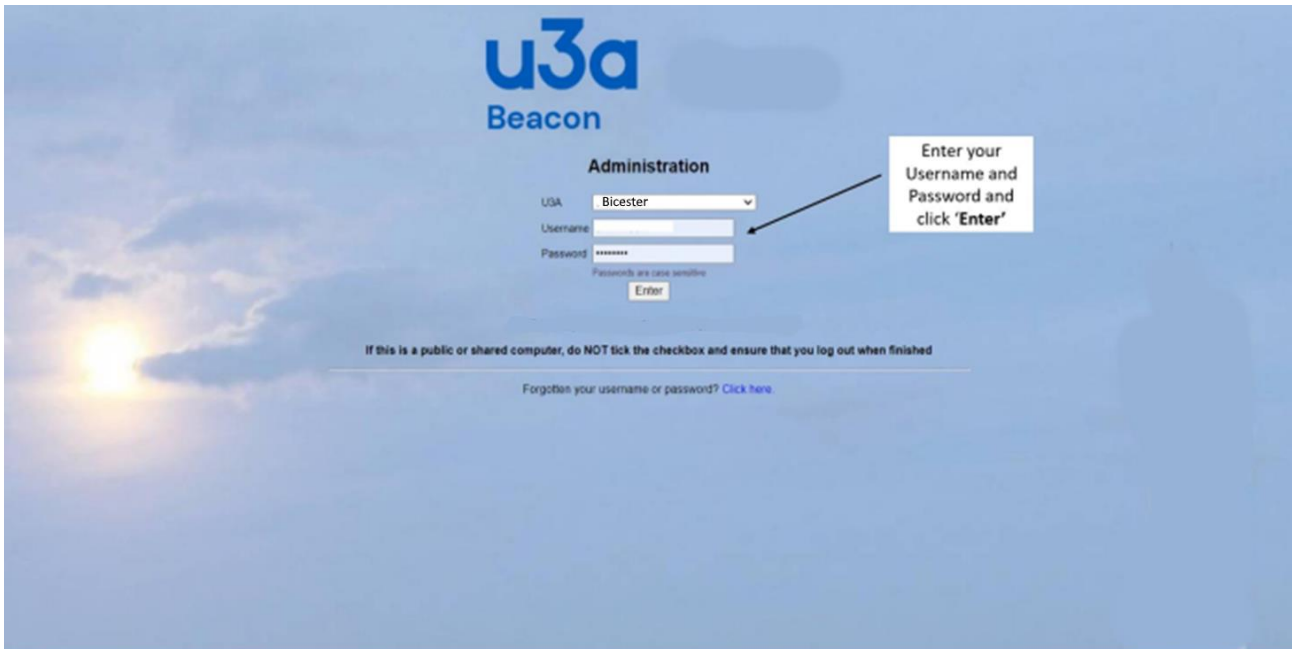


Figure 3.

* If it is your first-time entering Beacon, you will be asked to change the password to your own password at this stage before you can continue to your group.

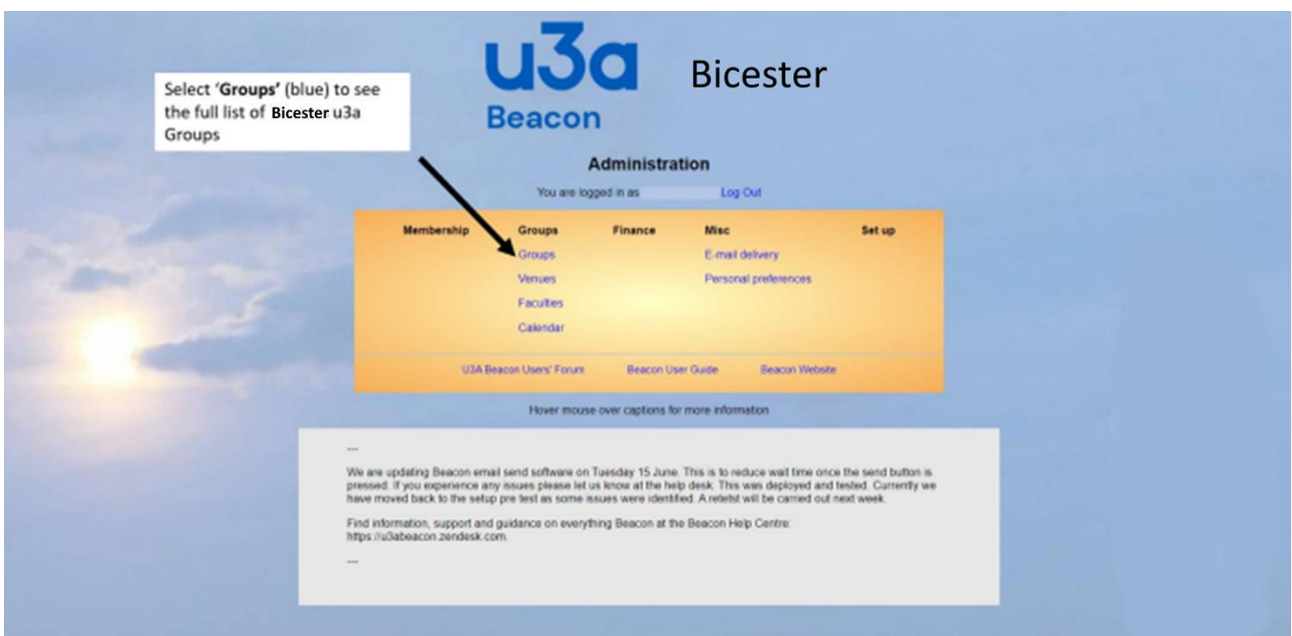


Figure 4.

- You will now see the list of Groups run by Bicester u3a, but you need to scroll down to see them all

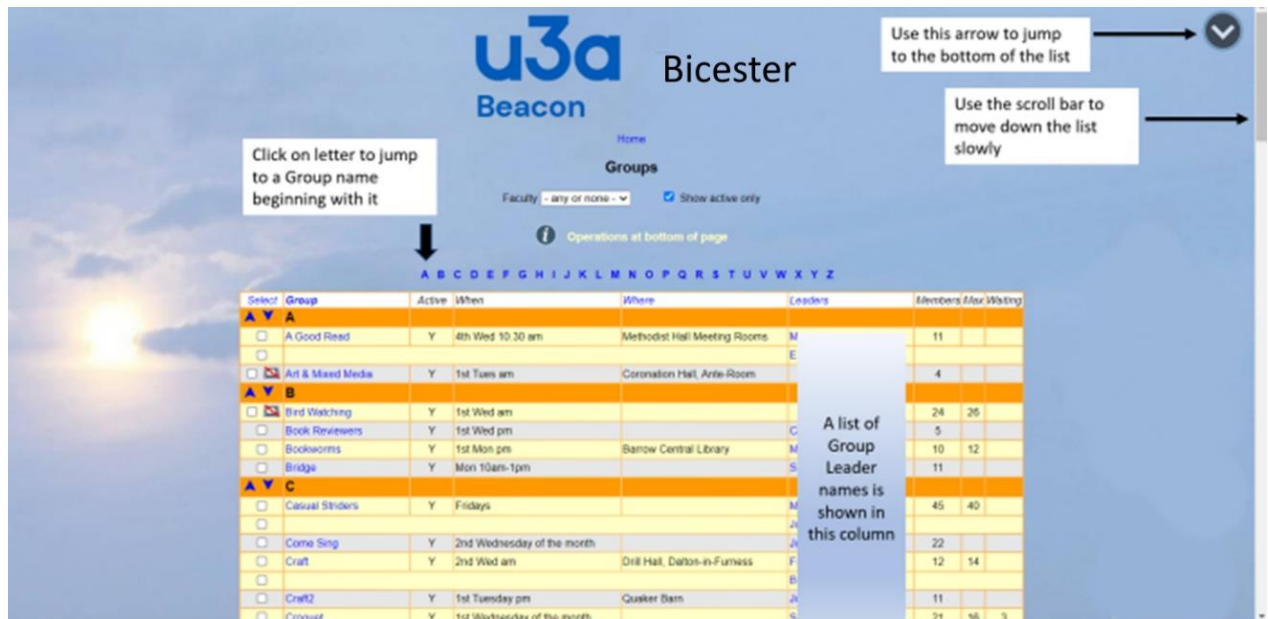


Figure 5.

- You will only be able to access the Group(s) you lead. The rest will be greyed out.
- Click on your Group name (in blue)

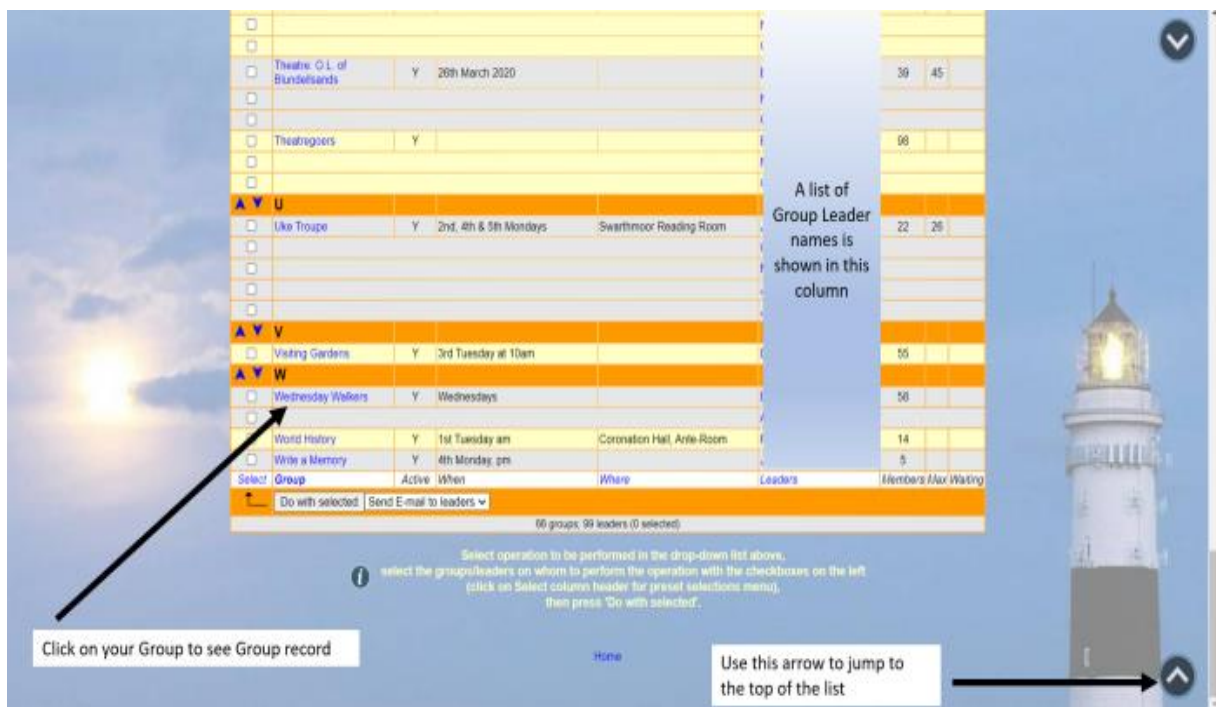


Figure 6.

- This takes you to the first screen for your Group

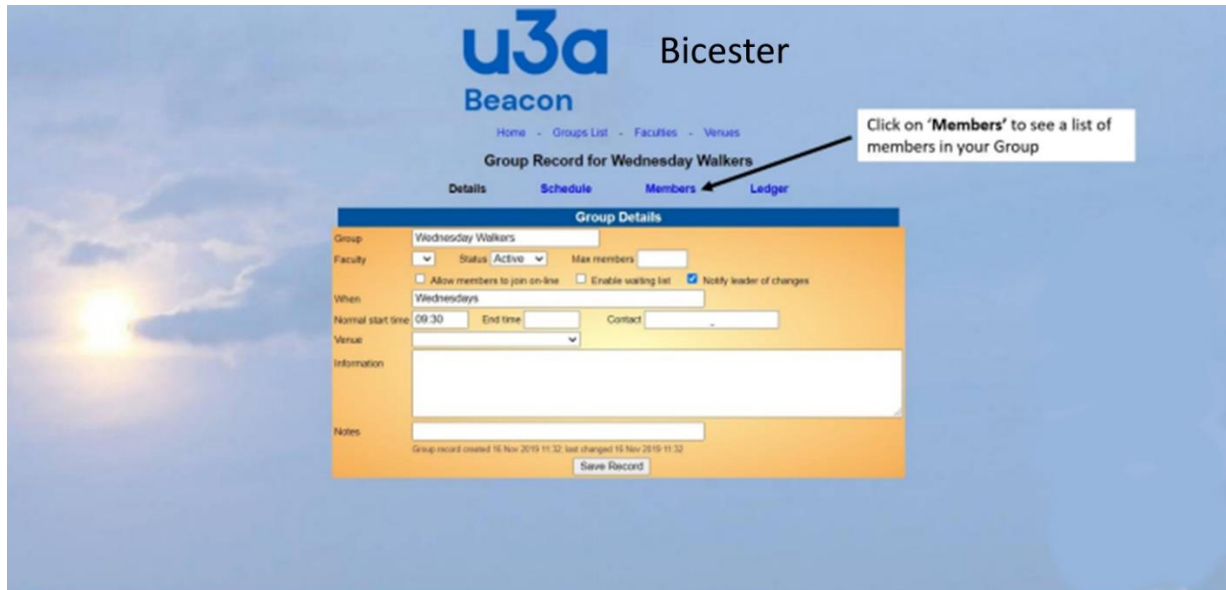


Figure 7

- The next screen you will see has the details of all the members in your Group (*Only top half of screen showing for a large group)

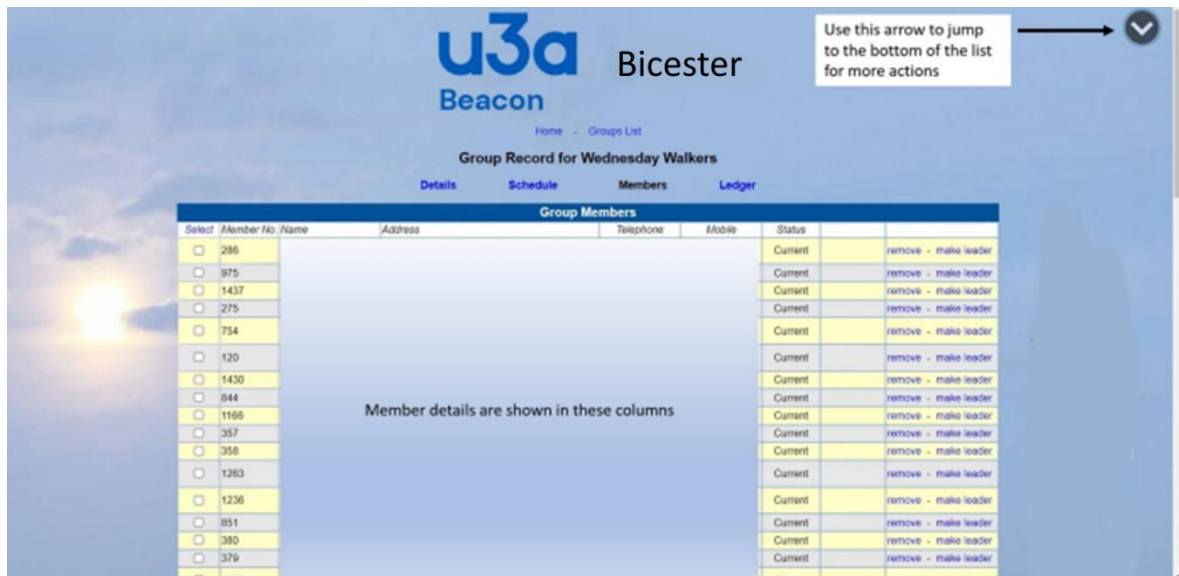


Figure 8.

ADDING MEMBERS - Go to the bottom of the screen to **Add Member by membership number**



Figure 9.

SENDING EMAILS – Go to the list of Members in your Group (Figure 7.)



Figure 10.

- In order to choose **'Select All'**, you will need to click on **'Select'** (blue) at the bottom left of the screen to reveal the black drop-down list as shown.

- This screen shows every Member selected, but you can select specific members manually if you want to limit the number of email recipients



Figure 11.

- The email screen will be presented, and maybe overlaid with the message below. This message is normal. Press **OK** to go to the next screen.

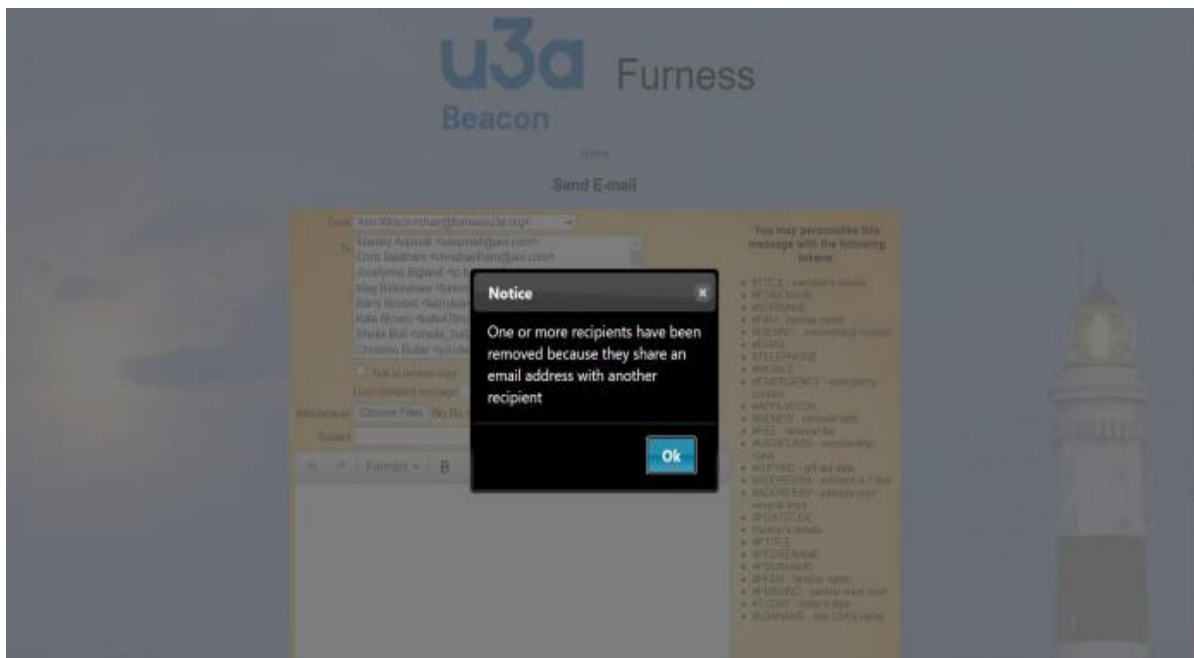


Figure 12.

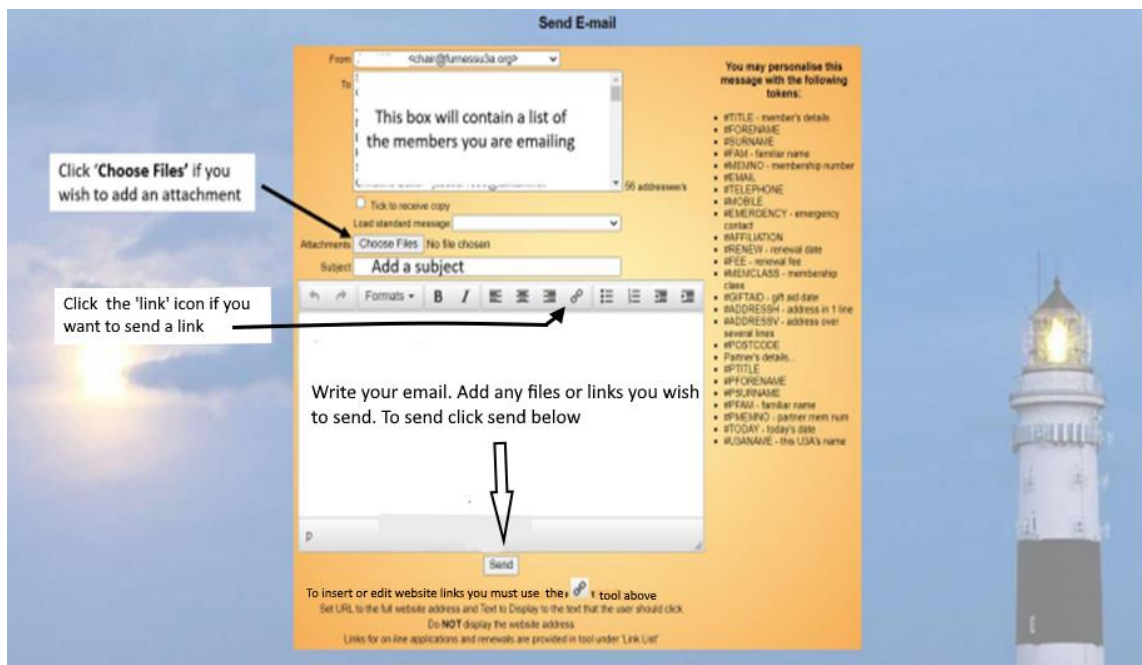


Figure 13.

- Compose your email message and click **'Send'**.
- You can add an *attachment* from your files if you wish.
- To send *a link* you must use the link icon. You will see clear instructions for including links in your emails under the word 'send' when on the email page itself in Beacon.
- A confirmation screen will appear when the email is sent successfully.

Instructions for recording finances, and other group records

Group leaders have access to their own group page only. You should find all you need in the Bicester u3a specific picture guide above, for adding members and sending emails. For additional information such as recording finances (How to use 'Ledger') follow the appropriate link 5.2 to 5.5 below. Note the following instructions are for all group leaders nationwide although mostly applicable there may be minor differences.

Group Records

Groups for which you are a Leader or for which you have viewing or editing rights are highlighted blue. To view the **Group Record** for one of these Groups, click on the Group name in the Groups List, or elsewhere where Group names are shown.

Your Group Record comprises four sub-pages:

You can select between these see **[F]** below, on the row beneath the 'Group Record *name*'. The active sub-page has its name in black.

Group Record for Architecture

Details Schedule Members Ledger

Group Details

Group: Architecture

Faculty: Learning Status: Active Max members:

Allow members to join on-line Enable waiting list Notify leader of changes

When: 2nd Tuesday at 2:00pm

Normal start time: 14:00 End time: 16:00 Contact: Edmund on 0123 456 24

Venue: Corn Exchange

Information: The group either meets indoors at the Corn Exchange or has visits to buildings of interest.

Notes:

Group record created 28 Feb 2019 16:52; last changed 28 Feb 2019 16:52

Save Record

Figure 14

- For details of how to view and edit your Group Record sub-pages, refer to instructions for the sub-page you want via one of the links 5.2 to 5.5. below.

Details [see 5.2](#)

Schedule [see 5.3](#)

Members [see 5.4](#)

Ledger [see 5.5](#)

General background of the Beacon system

Beacon is the U3A movement's integrated membership, groups, finance and mailing system. It has a dedicated webpage at beacon.u3a.org.uk.

Beacon was developed within the U3A and has one job: to support volunteers in their day-to-day work. Beacon will evolve to meet the future needs of U3As.

U3A Groups, something central to U3As but not other organisations, are an important and integral part of Beacon. Beacon allows the membership secretary to be confident that those attending groups are members of the U3A, and it allows group leaders/conveners to keep track of their members. It even provides a simple book-keeping ledger for the groups to use.

The Finance module provides the tools a U3A treasurer needs to maintain and report on accurate financial records.

The Beacon mailing feature allows membership secretaries, group leaders/conveners and committee members to create customised mailing lists of their members and to send them information, complete with delivery tracking.

Beacon's membership module supports the maintenance of membership records in an intuitive way. It provides useful statistics,

Should you have questions you may find answers in the generic link below.

Here there are video introductions and a generic online user guide note it is not Bicester specific. . Group leaders do not have access to all facilities in the large guide available online link below.

Online user guide [User Guide – u3a Beacon \(zendesk.com\)](https://zendesk.com)

Alternatively for local Bicester advice please contact Beacon@u3abicester.online