

# Group Leaders Beacon User Guide

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

Every screenshot is shown as you will see it when you log into Beacon, using the Username and Password sent to you by the Bourne u3a Beacon System Administrator.

The Groups Coordinator will discuss this with you, and arrange for access to Bourne U3A Beacon system

To go to the Beacon logon screen, enter the Beacon Web address <https://u3abeacon.org.uk/> into your Browser


Do not share members information with other group members without permission from the member.

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

If you have any queries, please contact the Groups Coordinator by email to [groups@bourneu3a.org.uk](mailto:groups@bourneu3a.org.uk)

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## LOG IN SCREEN



The image shows a login screen for 'u3a Bourne Beacon'. The background is a photograph of a lighthouse at dusk. The logo 'u3a Bourne Beacon' is in the top left. The word 'Administration' is centered above the login fields. There are three input fields: 'USA' with a dropdown arrow, 'Username', and 'Password' with a masked password '\*\*\*\*\*'. Below the password field is the text 'Passwords are case sensitive' and an 'Enter' button. A checkbox is checked with the text 'This is a private computer - tick to store local settings'. Below that is a warning: 'If this is a public or shared computer, do NOT tick the checkbox and ensure that you log out when finished'. At the bottom, there is a link: 'Forgotten your username or password? [Click here](#)'.

**u3a Bourne Beacon**

**Administration**

USA

Username

Password

Passwords are case sensitive

This is a private computer - tick to store local settings

**If this is a public or shared computer, do NOT tick the checkbox and ensure that you log out when finished**

Forgotten your username or password? [Click here](#)

# u3a Beacon

## Administration

U3A

Username

Password

Forgotten your username or password? [Click here.](#)

- Blackwater
- Blyth
- Boldon
- Bolton
- Bourne**
- Bourton and District
- Bracknell Forest
- Bradford
- Bradford on Avon & Dist
- Braintree Area
- Branston & District
- Brecon
- Bridgend
- Bridgnorth & District
- Brighton & Hove
- Brighton Five Deans
- Bristol
- Bromborough
- Bromley
- Brunswick West Hove & Por

Select the correct U3A, enter your username and password and press Enter

# u3a Beacon

## Administration

U3A

Username

Password

Passwords are case sensitive

Enter your Username and Password and click 'Enter'

This is a private computer - tick to store local settings

If this is a public or shared computer, do NOT tick the checkbox and ensure that you log out when finished

Forgotten your username or password? [Click here.](#)

Select 'Groups' (blue) to see the full list of Bourne u3a groups

Your name will appear here

Administration

You are logged in as [ ] Log Out

Membership Groups Finance Misc Set up

Groups  
Venues  
Calendar

E-mail delivery  
Personal preferences

U3A Beacon Users' Forum Beacon User Guide Beacon Website

Hover mouse over captions for more information

**Beacon system service will occur on the first Tuesday of each month at 10.30am and could be unavailable for up to 30 minutes.**

**This will mean that you should plan not to be in Beacon at 10.30am on the first Tuesday in the month. If you are, you may lose unsaved work.**

Find information, support and guidance on everything Beacon at the Beacon Help Centre:  
<https://u3abeacon.zendesk.com>.

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

The screenshot shows the 'u3a Bourne Beacon' website's 'Groups' page. At the top, there are navigation links for 'Home' and 'Groups'. Below this, there are filters for 'Faculty' (set to 'any or none') and a 'Show active only' checkbox. A callout box says 'Click on letter to jump to a Group name beginning with it' with an arrow pointing to the alphabetical index 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. Another callout says 'Use this arrow to jump to the bottom of the list' with an arrow pointing to the right. A third callout says 'Use the scroll bar to move down the list slowly' with an arrow pointing to the scroll bar on the right. The main content is a table of groups with columns for 'Select', 'Group', 'Active', 'When', 'Where', 'Leaders', and 'Members/Max/Waiting'. A callout box points to the 'Leaders' column, stating 'A list of Group Leader names is shown in this column'. The table lists groups such as 'A Good', 'Art & Mixed Media', 'Bird Watching', 'Book', 'Books', 'Bridge', 'Casual Striders', 'Come', 'Craft', and 'S'. The 'A Good' group is highlighted in blue, indicating it is the user's group.

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) This takes you to the first screen for your Group

The screenshot shows the 'Group Record for SKY-DIVING' page on the u3a Bourne Beacon website. The page has a header with the u3a logo and navigation links for 'Home', 'Groups List', and 'Venues'. Below the header, there are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Details' tab is selected, showing a form for 'Group Details'. The form includes fields for 'Group' (Sky-diving), 'Faculty', 'Status' (Active), 'Max members', 'When' (As required), 'Normal start time', 'End time', 'Venue', 'Information', and 'Notes' (Beacon Buddy Him Upstairs). There is a 'Save Record' button at the bottom. The page also shows a timestamp: 'Group record created 4 Aug 2016 16:36; last changed 7 Jul 2017 14:28'.

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)

u3a Beacon Bourne

Home - Groups List

Group Record for Sky-Diving

Details Schedule Members Ledger

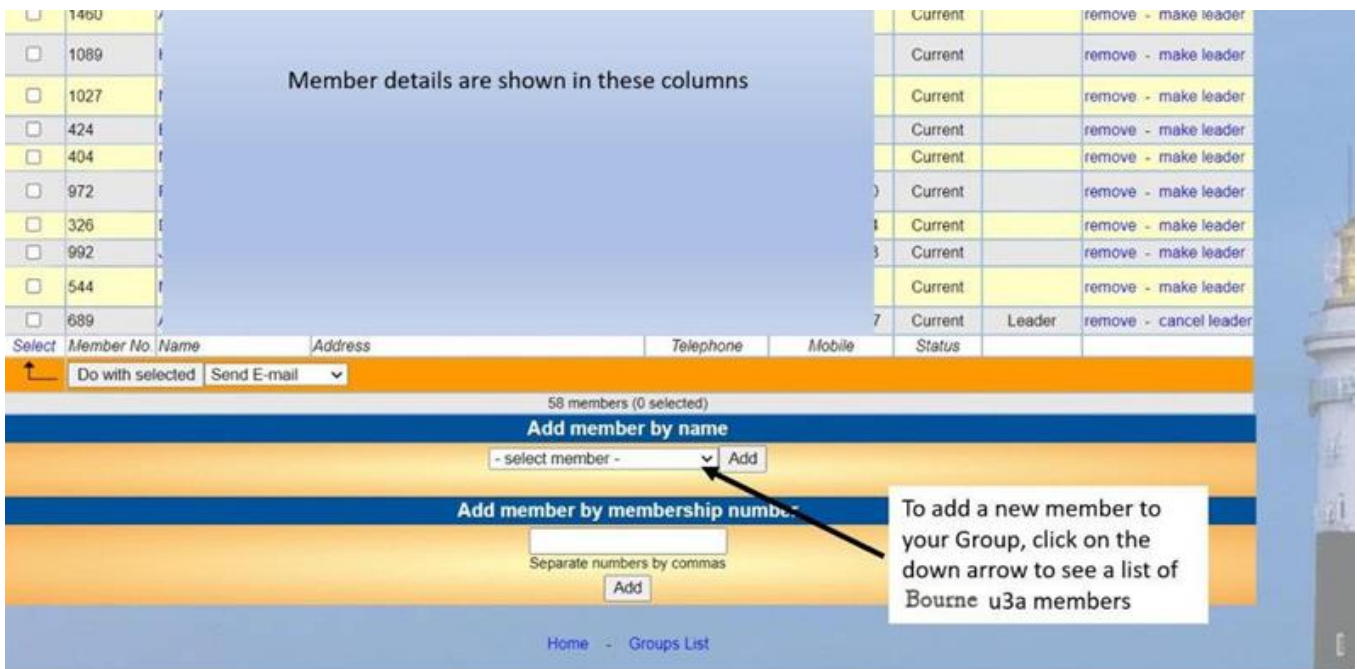
| Group Members            |                  |           |        |        |         |                        |
|--------------------------|------------------|-----------|--------|--------|---------|------------------------|
| Select                   | Member No / Name | Telephone | Mobile | Status | Current |                        |
| <input type="checkbox"/> |                  |           |        |        |         | remove - cancel leader |
| Select                   | Member No / Name | Telephone | Mobile | Status | Current |                        |

↑ Do with selected Send E-mail

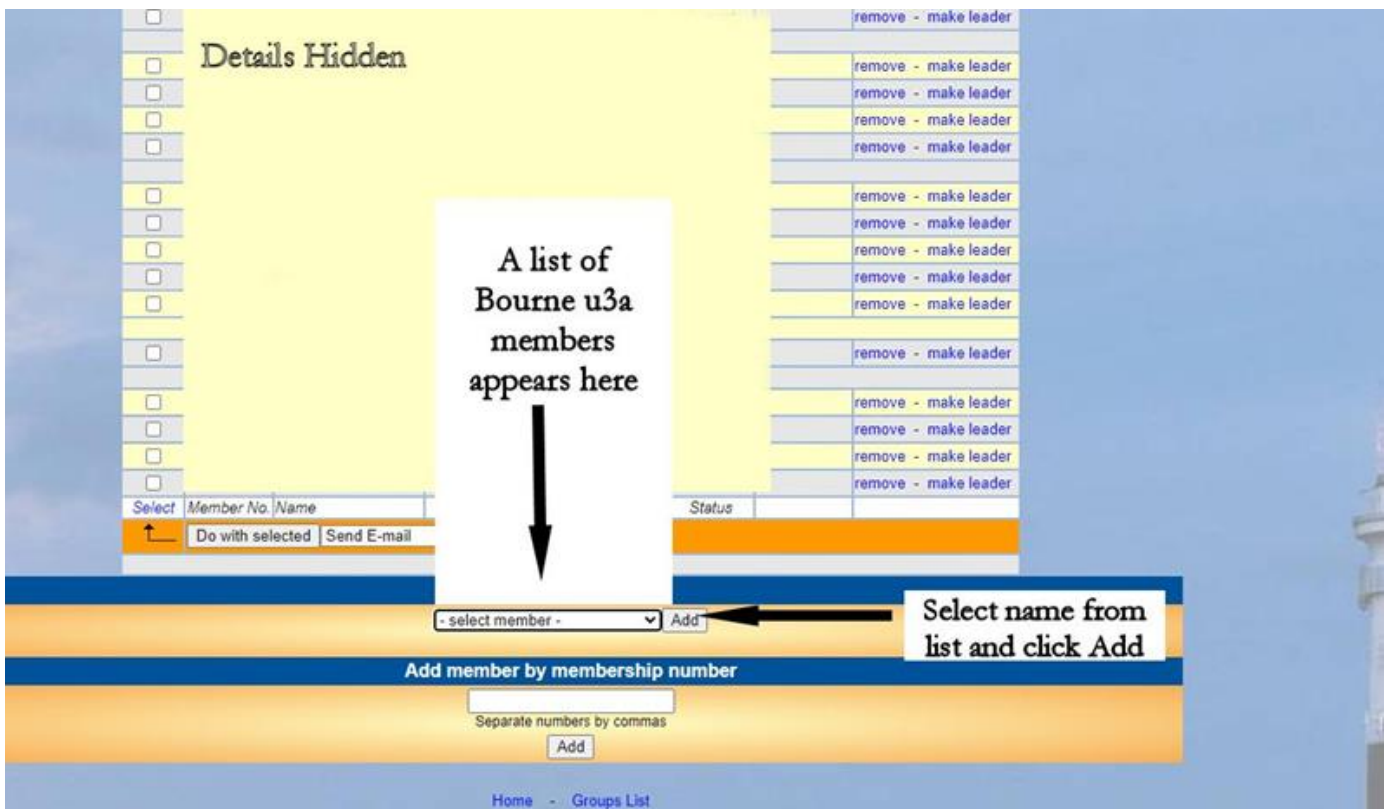
1 members (0 selected)

Home - Groups List

## ADDING MEMBERS - Go to the bottom of the screen to Add Member by Name



You will now see a list of all the Members in the Bourne u3a in alphabetical order in the pop-up panel



Click the name of the member you wish to add to your Group



## SENDING EMAILS – Go to the list of Members in your Group

A list of Member details is shown in these columns

| Select                   | Member No | Name | Address | Telephone | Mobile | Status  |                      |                        |
|--------------------------|-----------|------|---------|-----------|--------|---------|----------------------|------------------------|
| <input type="checkbox"/> | 1482      |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 997       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 1460      |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 1089      |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 1027      |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 424       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 404       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 972       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 326       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 992       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 544       |      |         |           |        | Current | remove - make leader |                        |
| <input type="checkbox"/> | 689       |      |         |           |        | Current | Leader               | remove - cancel leader |

Select All  
Clear All  
E-mail only  
Without E-mail

Send E-mail

58 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add

Home - Groups List

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

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

A list of Member details is shown in these columns

| Select                              | Member No. | Name | Address | Telephone | Mobile | Status  | Leader |                        |
|-------------------------------------|------------|------|---------|-----------|--------|---------|--------|------------------------|
| <input checked="" type="checkbox"/> | 592        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 1482       |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 997        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 1460       |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 1089       |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 1027       |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 424        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 404        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 972        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 326        |      |         |           |        | Current | Leader | remove - cancel leader |
| <input checked="" type="checkbox"/> | 992        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 544        |      |         |           |        | Current |        | remove - make leader   |
| <input checked="" type="checkbox"/> | 689        |      |         |           |        | Current | Leader | remove - cancel leader |

58 members (58 selected)

**Add member by name**

- select member - Add

**Add member by membership number**

Separate numbers by commas

Add

Home - Groups List

boxes on the far left will be in blue, ready for the next  
Click 'Do with Selected' to he email screen

Remember to tick next to your own name to receive a copy.

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

u3a Beacon

Send E-mail

From: neso3a.org  
To: nali@aol.com, sathani@aol.com

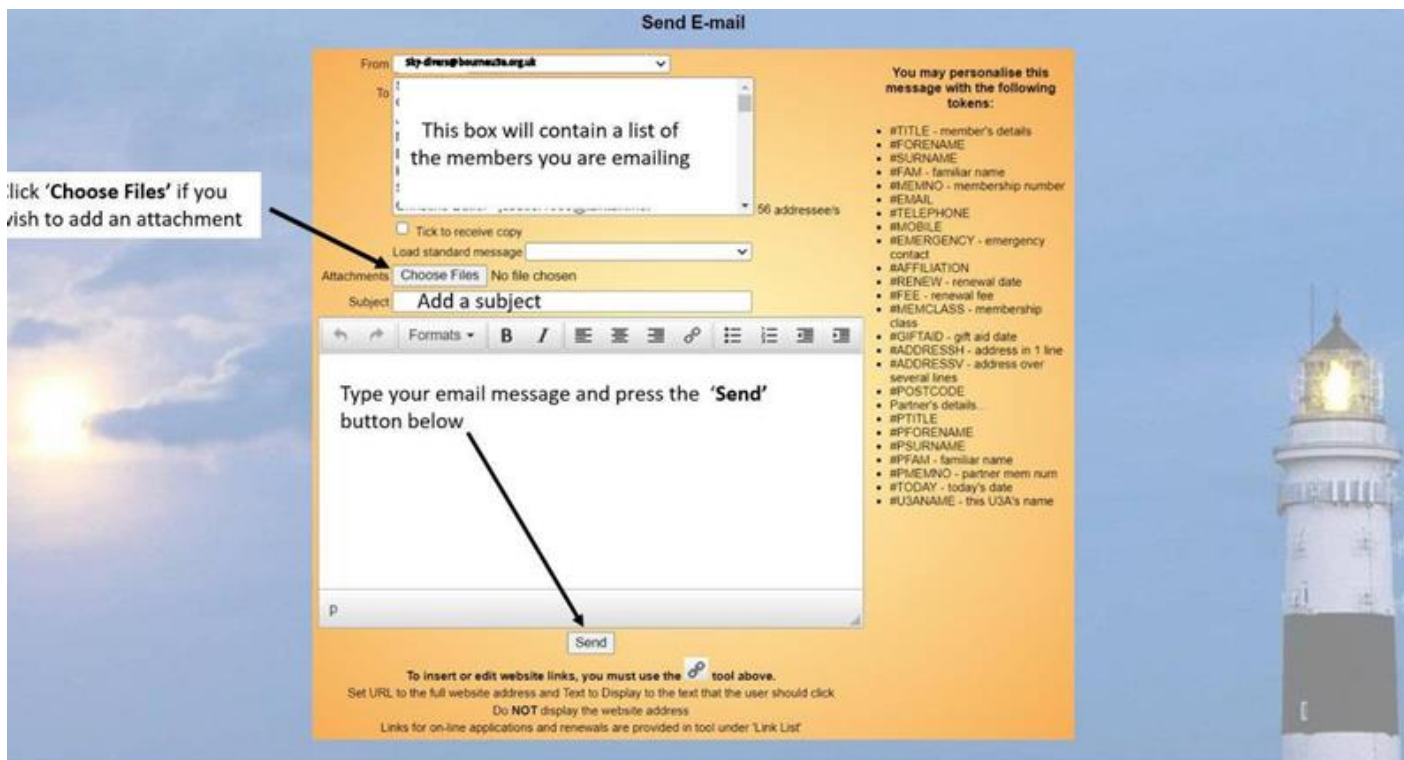
Notice

One or more recipients have been removed because they share an email address with another recipient

Ok

You may personalise this message with the following tokens:

- %TITLE - member's details
- %FORNAME
- %SURNAME
- %FAM - familiar name
- %MEMNO - membership number
- %EMAIL
- %TELEPHONE
- %MOBILE
- %EMERGENCY - emergency contact
- %AFFILIATION
- %RENEW - renewal date
- %FEE - renewal fee
- %MEMCLASS - membership class
- %GIFTNO - gift aid date
- %ADDRESS1 - address in 1 line
- %ADDRESSV - address over several lines
- %POSTCODE
- Partner's details
- %PTITLE
- %PFORNAME
- %PSURNAME
- %PFAM - familiar name
- %PMEANO - partner mem num
- %TODAY - today's date
- %USANAME - the USA's name



You must enter something into the 'SUBJECT' box or the email will not be sent.

To start the email, you will notice on the right, a list of 'Tokens' or '# shortcuts'. These save you typing and time on common tasks.

If you were sending an email to Joseph Smith, you start your email by typing, *Dear #FORENAME*, every email sent, will have the members own first name on their email, for example it will read Dear Joseph.

If you type *Dear #TITLE #FORENAME #SURNAME*, the email received will read, Dear Mr Joseph Smith.

If you type *Dear #FORENAME* and *#PFORENAME*, the email will be received showing Dear Joseph and Sue.

If you use the Token *#FAM*, the members name will show as Jo, if member entered this as the name he likes to be known as in the u3a.

Compose your email message and click 'Send'. You can also add an attachment from your files if you wish.

## Email confirmation screen

