# U3A Beacon: Groups

Introduction

U3A Beacon is an on-line facility for managing U3A local associations, with particular emphasis on membership, finance and groups. It has been designed from the outset to be simple to use with links on the home page to the Beacon User's Guide and the U3A Beacon Users Forum – both helpful when problems arise. Beacon is secure - all U3As are co-hosted on the same server, with security arrangements isolating the data of each U3A from that of all others. Beacon helps us ensure that our U3A is effectively managed to the benefit of all our members. In particular it facilitates:

- **Emailing** group members with e.g. travel arrangements, programme updates, menus, guidance notes, bridge scores etc.
- **Contingency planning** - a temporary leader can be nominated in the event of illness to ensure groups are kept informed.
- **Waiting List management** – for groups with limited capacity e.g. Yoga and Cycling
- **Emergency contact details** (if they have been recorded) can be retrieved for group members using a smartphone

Logging in

Beacon is accessed via your web browser on computer, tablet or smart phone at https://u3abeacon.org.uk. Simply enter your U3A name (Upper Bann in our case), Username and Password. These are allocated by your U3A site administrator, John Trimble (johntrimble@outlook.com) who can also assist if you forget your password which is case sensitive and must contain upper and lower case letters and numeral e.g. glasGOW4fr. If, and only if, you are using a private (home) computer tick the box below the Enter button to save your settings for future sessions.
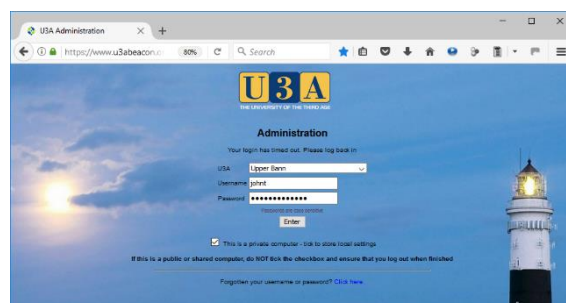
Roles and privileges

Each user will have been given a set of defined roles and privileges which control the level of access they have to data e.g. Group Leaders will be able to see and print out names, addresses, phone numbers and emergency contact details for members of their group together with emergency contact information. They will be able to add and remove members from their groups but cannot edit group members' personal data.

A typical Home or Administration screen for a group leader is shown right. Click on the links in blue text e.g. Groups, Venues and Faculties to be taken to the next page. Note, there is no access to the Finance and Membership modules of Beacon for Group Leaders.
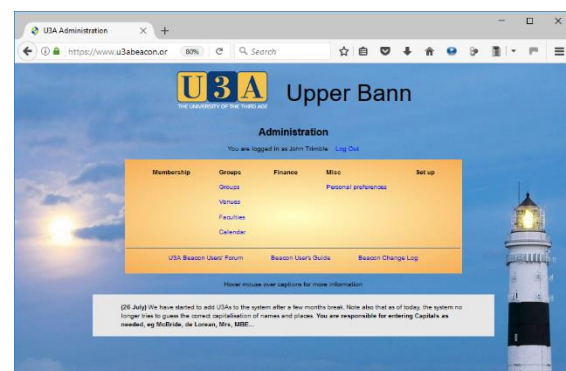
Groups

Clicking on the Groups link on the Administration screen (above) brings you to the Groups page showing current, although not necessarily active, groups in your U3A. The left hand column of this table allows you to select all or any of the groups, using tick boxes, and download/print data as an Excel table. The tick boxes also let you email selected or all group leaders who have email. To select all click on Select on the header row of the table. Scroll to foot of the table to pick what you wish to do with selection, i.e. send email or download, and press the "Do with selected" button.

Group names in blue can be clicked to access and edit group details.

Leader names in red mean they are not currently a member of U3A.

Details

The Details page is where you will enter, you've guessed it already, details about your group – where, when and how often it meets, maximum numbers if applicable and other useful information. As you hover over fields and buttons a popup message may appear giving a tooltip (see right) and explanation. After a while tooltips close themselves but you can speed this up by clicking on an underline empty part of the page.

Fill in as much information as you see fit but you can of course come back and edit and expand this data at any stage. Start and end times are set by using sliders but they can also be typed in. Although you can view information held in Beacon on Venues used by U3A groups you will have to contact your system administrator to make edits.
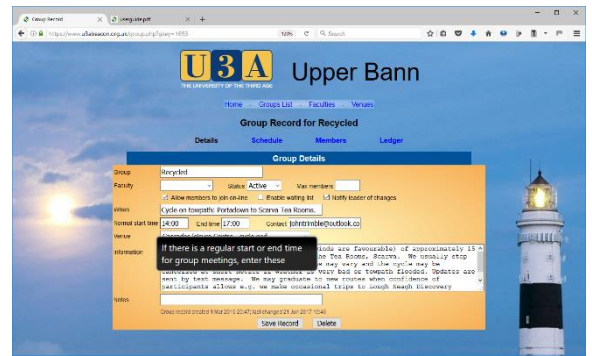

Schedule

The Schedule page helps you to create and publicise your programme of events – it can be viewed by group members and visitors to U3A's web page reducing the need for one individual to gather and disseminate information about group activities – sharing and lightening the load.

The Add Events section at the bottom of the screen helps you populate the schedule and give details of events. The start date and time of the first event you want to add can be picked from a pop-up calendar or typed. Regular e.g. weekly events can be entered in a batches.
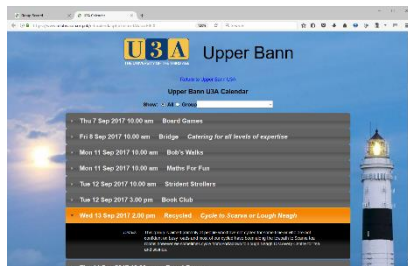
Much of this information will be used in our U3A calendar of events which will be accessed via the Upper Bann U3A web site or using the link below. Have a look at the calendar to see how the finished entries will appear to the public.

https://www.u3abeacon.org.uk/u3acalendar.php?u3a=34&sc=FBLX
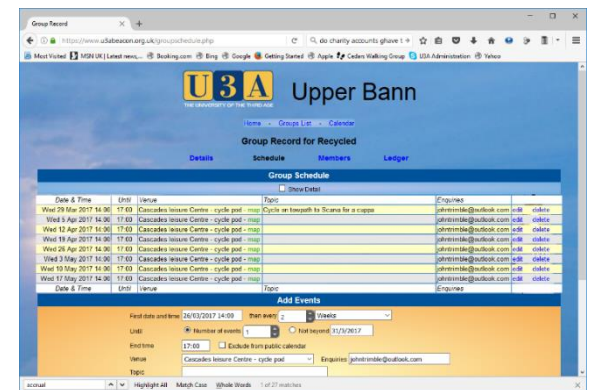
Members

The Members page is where members are added to and removed from groups. It prompts you if members have not renewed their membership – names will appear in red. It also allows you (in the right hand make leader column) to "promote" a member of the group to a leadership role, perhaps to handle communications – the system administrator will supply a user name and give them the necessary privileges.

When applicants to the group exceed the maximum allowed this page will handle the waiting list, recording when their names were added.

Clicking in the tick boxes in the left hand Select column allows you to send emails to all or any of your group with email, download contact details for members (including photographs where available in the PDF option) and remove members. When you have selected the action you require don't forget to click on Do with selected to complete the task.

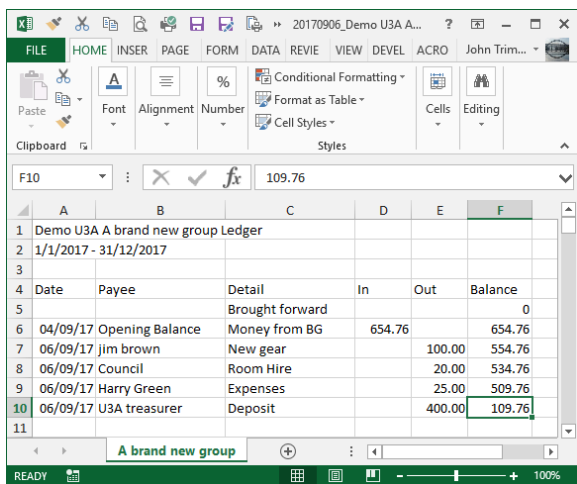Adding a new member is simple – just select their name from a drop down list and hit the Add button. Names can be sorted by forename or surname by clicking on Personal Preferences on the home page – don't forget to save any changes you make on this page. If you have lots of names to add talk to your system administrator.
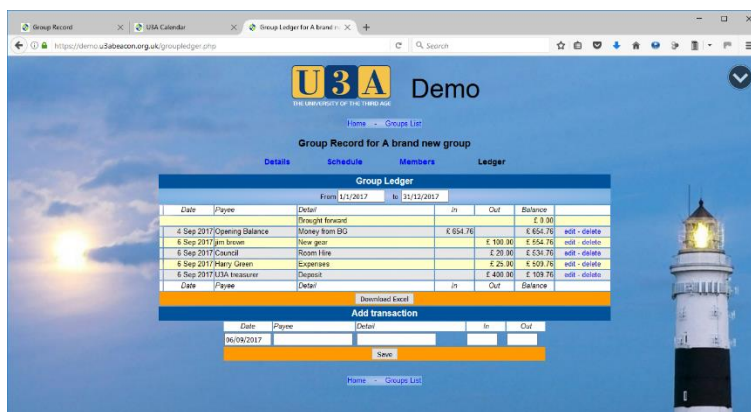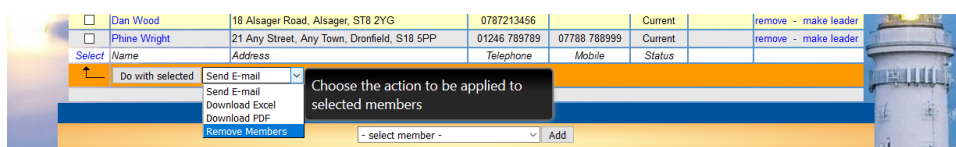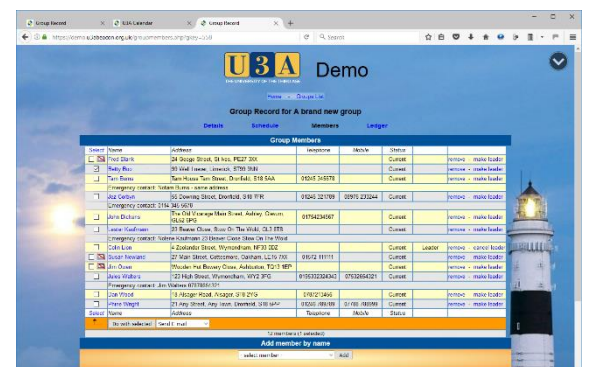
Ledger

The Group Ledger page records financial transactions related to your group e.g. contributions from group members, postage costs, purchase of equipment and room hire.

It is essentially a simple cash book recording money in and out but it gives a degree of control over and accountability for your financial transactions.

It is perhaps too easy to delete and edit entries in the Group Ledger so it's not perfect but it does allow group leaders to keep a financial record other than in a little notebook at the bottom of their sock drawer so others can be allowed access to and control over this information if required.

The Ledger can be displayed and downloaded for a specified date range e.g. 1 April 2016 to 1 April 2017 by editing the dates shown at top of the table, just below the Group Ledger title.

Email

Recommendations for all Beacon users sending email

1. Minimise the frequency of sending emails to similar large lists (over 50) of recipients. It is better to delay until you have more information to put into a single email.

2. Avoid sending emails that the majority of recipients won't bother to open. It encourages the system to assume that messages from the sender are spam.

3. If you are sending an email to a large number of people, say over 50, please accept that your email will be processed by spam filters in the same way as mass marketing emails. Therefore you should follow the following industry guidelines for such mail.

   i. Avoid or minimise sending attachments when sending an email to large lists of recipients. It is tempting to do so, as Beacon and SendGrid enable you to do so, but it is recommended instead to put the files on to your website and to provide a weblink to let the user download the file if they want. You can alternatively use services such as Dropbox
   ii. When putting a link (URL) into an email, do NOT use the URL itself as the clickable visible text. Instead use some descriptive English text. Note that this is the opposite of Beacon's previous guidance and is due to the way SendGrid handles links, and you may need to change some of your standard email messages
   iii. Maximum organisation visibility helps as well. Including your physical mailing address and phone number in your email footers helps mail providers recognize you as a legitimate organisation and sender of email. This also helps your recipients know that this message is indeed from you!
   iv. Provide an explicit way for the recipient to unsubscribe from getting emails from you, even though you know they have said they want such emails. For example at the bottom of your email:

      "To unsubscribe from these mails email Memsec@yourU3A with subject unsubscribe from emails"

Beacon is not one-size-fits-all; its authors have tried to accommodate many different ways of working. But sometimes it will make sense to just go with administrative solutions that work best for most. We need to remember that Beacon will probably be our core U3A admin system for many years to come - as we look at things that need fixing, things that need changing, and things that would be-nice-to have as feature enhancements, we should bear this in mind. Having said that, feedback is always welcome.

John Trimble
System Administrator – Upper Bann U3A
- *Wednesday, 06 September 2017*