



Maghull & Lydiate U3A BEACON TRAINING

An Introduction for GROUP LEADERS

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A. Logging on for the First Time

1. When a Beacon account has been set up for you by the administrator an email will be sent to you giving details of your personal username and a **temporary** password.
2. Go to the Beacon login screen: <https://u3abeacon.org.uk/password.php>
3. Select **Maghull and Lydiat** from the drop-down list of U3A's.
4. Fill in your username and the temporary password.
5. Click **Enter**.
6. The next screen should ask you to type in a new password which must contain at least 1 upper case letter, 1 lower case letter, a numeric character and be at least 8 characters long. **Before you go any further please make a note of your new password.**

Passwords should comprise between 8 and 15 characters 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: _ - \$ ^ % ! # < > .

New password: Good password

Confirm: Confirmed

Please also enter a personal question and answer

You may answer the question given or change it to something else. The answer should be unknown by most other people.

Question:

Answer: ×

Enter a personal security question with an answer. You can use the question presented (your first school) or change it to something else – something that is unknown by most other people. After pressing **Submit**, if successful, you will be taken into the Beacon system.

B. System User Roles

As a Group Leader, you will be given specific access to the Beacon System. There are different levels of access for different roles such as Membership Secretary, Treasurer etc. GL's are not able to delete or amend the membership database. You only have permission to add, amend or delete members of your own group. ***Before you are provided with access to Beacon you will be required to sign an undertaking to comply with M&L-U3A Information Security Guide for Beacon System Users.***

C. Groups Page

After logging in you will be taken to the Beacon Home page. You will see the blue links shown below, which indicate the pages of the system you can access.



The main page GL's will be interested in will be the Groups page under the Groups heading.

- Clicking a blue link usually closes the current page and jumps to a new page.
- Holding down the **Ctrl** key while clicking a blue link opens the new page on a new tab while keeping the existing page open.

Clicking the blue Groups link will take you to the Groups page shown below.

Home

Groups

Faculty - any or none - ☒ Show active only

Operations at bottom of page

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

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲ ▼ A								
<input type="checkbox"/>	Architecture for Fun	Y	2nd Thursday of the Month	Varies	George Birchall	1		
<input type="checkbox"/>	Art Appreciation	Y	Monthly	Varies	Maureen Birchall	1		
▲ ▼ B								
<input type="checkbox"/>	Badminton Group 1	Y	Wednesday	St Georges URC, Church Hall	Colin Gore	1		
<input type="checkbox"/>	Badminton Group 2	Y	Friday (Term time only)	Maricourt High School				
<input type="checkbox"/>	Beginners Bridge	Y	Mondays	Kensington House	Jane Jones	1		
<input type="checkbox"/>	Bowls	Y	Mondays	Kensington House	Anthony Snape	1		
▲ ▼ C								
<input type="checkbox"/>	Canal Walking	Y	4th Thursday of the month	Varies	Anne Blundell	1		
<input type="checkbox"/>	Card Making	Y	Mondays	St Georges URC, Church Hall	Joan Martin	1		
<input type="checkbox"/>	Coffee Mornings	Y	Tuesdays	Maghull Baptist Church	Tony Dodd	8		
<input type="checkbox"/>	Computer Group	Y	Tuesdays	Maghull Baptist Church	Rhoda Myers	6		

The Groups table lists all the Groups in M&L U3A. This table can be sorted by clicking the headings at the top. The Alphabet Letters will enable you to jump quickly to a specific group. Only the group or groups that you are Group Leader of will have a blue link to other pages. Clicking on your group's name will open a page with four headings at the top. (see below)

• Details Page

All groups have a Details page. This can be edited by the GL. Some of the options are not needed at this stage until the Members Portal is activated. However it is worth considering, for example, if you would like to enable a waiting list for future members to join your group and the other options.

Home - Groups List - Faculties - Venues

Group Record for Coffee Mornings

Details Schedule Members Ledger

Group Details

Group: Coffee Mornings

Faculty: Status: Active Max members:

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

When: Tuesdays

Normal start time: 10:00 End time: 11:30 Contact:

Venue: Maghull Baptist Church

Information: Weekly social event.

Notes:

Group record created 7 Sep 2021 16:18; last changed 7 Sep 2021 16:18

Save Record Delete

• Schedule

The schedule page enables a GL to alter information about the timings of the group. This would take effect in the members portal where a Calendar of Meetings and group events for all members is shown.

Home - Groups List - Calendar

Group Record for Coffee Mornings

Details Schedule Members Ledger

Group Schedule

☐ Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Tue 9 Nov 2021 10:00	11:30	Maghull Baptist Church - map			edit delete
Date & Time	Until	Venue	Topic	Enquiries	

Add Events

First date and time: 08/11/2021 10:00 then every 2 Weeks

Until: ☒ Number of events 1 ☐ Not beyond 31/3/2022

End time: 11:30 ☐ Exclude from public calendar

Venue: Maghull Baptist Church Enquiries:

Topic:

Details:

To add a single event, set Number of Events to 1

Add Events

• Group Members

The members of the group can be shown by clicking the members link. Currently, this shows each member with their telephone number(s) alongside.

PLEASE NOTE: Part of the Information Security Guide for Beacon System Users requires you to comply with the M&L-U3A Data Protection and Privacy Policies.

u3a Beacon Maghull and Lydiat

Home - Groups List

Group Record for Coffee Mornings

Details Schedule Members Ledger

Select	Member No.	Name	Telephone	Mobile	Status	
<input type="checkbox"/>		Dorothy Brannigan			Current	remove - make leader
<input type="checkbox"/>		Alan Carr			Current	remove - make leader
<input type="checkbox"/>		Phil Davidson			Current	remove - make leader
<input type="checkbox"/>		Tony Dodd			Current	Leader remove - cancel leader
<input type="checkbox"/>		Margaret Kendall			Current	remove - make leader
<input type="checkbox"/>		Frank Mercer			Current	remove - make leader
<input type="checkbox"/>		Linda Simms			Current	remove - make leader
<input type="checkbox"/>		Anne Willox			Current	remove - make leader

8 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add

Group members can be added by name or membership number. They can be removed by clicking the 'remove' link at the side. Normally, you should not make anyone else leader without the knowledge of the Group Coordinator.

• Email

By selecting a group member, (by ticking the box by the side of the name) you can email one or more members of the group. Click 'do with selected' to open the email page where you can write your message and add attachments. Ask your trainer to demonstrate this. Note: The 'email delivery' page will show a list of messages you have sent. Ask to be shown this page by your trainer.

Attachments Choose Files No file chosen

Subject

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Text color, Background color, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink, Source code.

• Ledger

The Ledger page enables a Group leader to record group finances in a simple ledger. This is not connected to the Our Main or Social accounting system, but the Treasurer will be able to see the Group Ledger for reference. In some cases, a second Group Leader could be responsible for inputting group accounts having had training.

The screenshot shows the 'Group Ledger' page with tabs for Details, Schedule, Members, and Ledger. The main table has columns: Date, Payee, Detail, In, Out, and Balance. A 'Brought forward' entry is shown with a balance of £ 0.00. Below the table is an 'Add transaction' section with fields for Date, Payee, Detail, In, and Out, and a 'Save' button.

D. Group Venues

The Group Venues page enables a view of each public venue used by M&L U3A. Clicking a venue shows more details.

Group Venues			
Name	Contact	Telephone	Accessible
Contact Leader for Venue info			
East Meade			
Green Lane			
Hudson Primary School		0151 526 1568	
Kensington House	Mike Telling	0151 526 1070	

E. Calendar

The Calendar page shows forthcoming events with various options for selecting and viewing, individual or multiple events can be set up using the Schedule function.

The screenshot shows the 'Calendar' page with a 'Show:' filter set to 'all'. Below the filter is a date range 'From 08/11/2021 To 06/02/2022' and a 'Show Detail' checkbox. The table lists events with columns: Date & Time, Until, Group, Venue, Topic, and Enquiries.

Date & Time	Until	Group	Venue	Topic	Enquiries
Tue 9 Nov 2021 10:00	11:30	Coffee Mornings	Maghull Baptist Church - map		
Tue 9 Nov 2021 10:00	11:30	Computer Group	Maghull Baptist Church - map		
Tue 16 Nov 2021 10:00	11:30	Computer Group	Maghull Baptist Church - map		
Tue 23 Nov 2021 10:00	11:30	Computer Group	Maghull Baptist Church - map		
Tue 30 Nov 2021 10:00	11:30	Computer Group	Maghull Baptist Church - map		

F. Personal Preferences

The screenshot shows the 'Personal Preferences' page with a section titled 'Drop-down name lists & Timeout'. It includes options for 'Sort by' (Surname, Forenames), 'Show' (Surname first, Forenames first), and 'Session timeout' (20 minutes). A note states 'Minimise timeout if this is a shared computer (max 20 mins)'. A 'Save Name Lists & Timeout' button is at the bottom.

Click Personal Preferences from the Home Screen to set the following preferences:

- Sorting of drop-down lists ('Surname' and 'Surname first' [recommended])
- Timeout period
- Change your password
- Change your personal Q & A

NOTE: when you have finished your Beacon Session, go to the Home page and LOG OUT using the link next to your Name.

Further detailed information for Group Leaders can be found at:
<https://u3abeacon.zendesk.com/hc/en-gb/sections/360002083037-5-Groups>

Please contact the administrator if you need further help or assistance:

Admin contact details: Tony Dodd – tonydodd5223@yahoo.co.uk