Maghull & Lydiate U3A
BEACON TRAINING

An Introduction
for
GROUP LEADERS
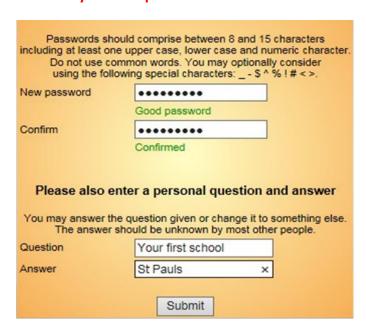
CONTENTS

A. Logging on for the First Time

1. When a Beacon account has been set up for you by the administratoran 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 Lydiate** 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**.

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.*
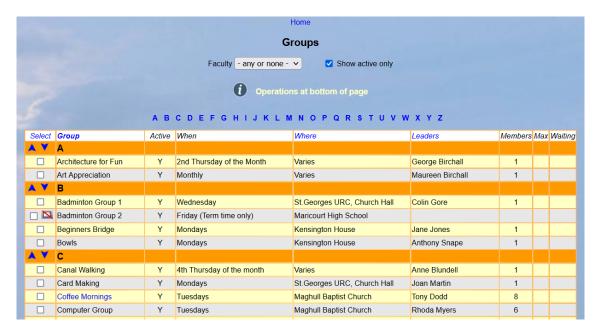
C. Groups Page

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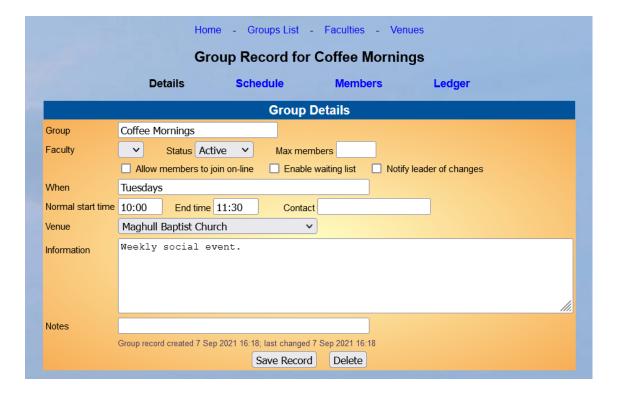
The Groups table lists all the Groups in M&L U3A. This table can be sorted by clicking the headings at the top. The Alphabet Letters will enable you to jump quickly to a specific group. Only the group or groups that you are Group Leader of will have a blue link to other pages. Clicking on your group's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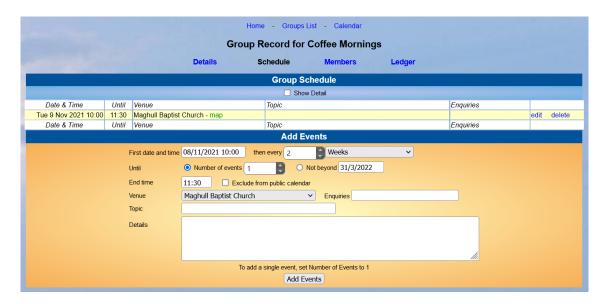
• Details Page

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.

• 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.

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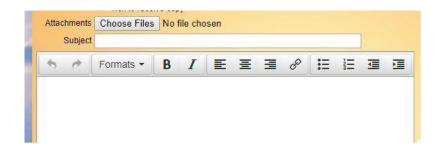
PLEASE NOTE: Part of the Information Security Guide for Beacon System Users requires you to comply with the M&L-U3A Data Protection and Privacy Policies.

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.
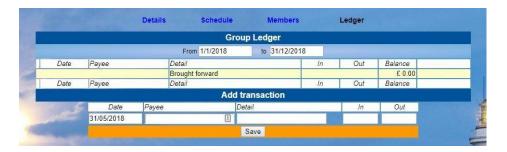
• Email

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.

• 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.

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.

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.

F. Personal Preferences

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

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

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*