

Beacon FOR GROUP LEADERS*

*MOST OF WHOM AREN'T DUMMIES

Learn to:

- Access your group's data on Beacon
- Enter the right information in each field
- Maintain your membership list
- Email your group members
- Add details for individual meetings
- Keep financial records in the Beacon ledger



Administration

U3A

Username

Password

Passwords are case sensitive

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

Beacon for Group Leaders

A guide to the Beacon system for group leader administration tasks

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Updated by Jacki Berry (February 2024)

Queries on the Beacon system should be sent to: administrator@plymouthu3a.org.uk

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What Is Beacon?

Beacon is an online management system designed by u3as, for u3as. It provides a means for managing members, groups and finances in a secure way. At its core Beacon is a database that holds information about a u3a's members, officers, groups, meeting venues, and finances. The front-end user interface is a series of screens that show different views of that information and allow data to be entered, changed, or deleted. Access to the information in Beacon is determined by role and the access privileges required for that role. You get certain privileges as a u3a member (looking at and changing your own personal profile, for example) and additional privileges if you are a group leader (changing your group's details). Certain roles on the Executive Committee have more extensive privileges to allow them to carry out their duties (adding new members, creating new groups, sending out emails to members, etc., depending on the role).

This guide is provided for Plymouth u3a group leaders (GLs) to show how to access Beacon's group leader administrative functions and update group information.

How to Get Access to the Beacon System

To gain access to the Beacon system, you will need to be set up as a system user. Send a request by email to the Beacon Administrator:

administrator@plymouthu3a.org.uk

Access to the system is defined by role, so your request should specify that you are a group leader and include the name(s) of the group(s) that you lead. You will be given administrative access to your group's records only.

Your login details will be emailed to you, along with a temporary password that you must change to one of your choice.

If you want to share the group leader responsibilities with another person, it is possible to add a second group member to administer your group's Beacon information. This person will also be allocated the role of group leader on the system. Again, please send your request to the Beacon Administrator at the email address above, providing the name of the member and the name of the relevant group.

How to Log on to Beacon as a Group Leader

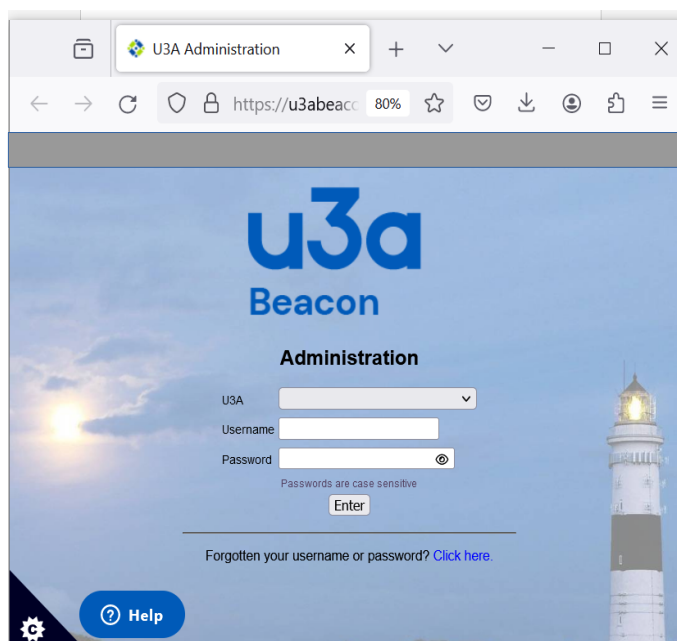
The Beacon site can be found by going to the Plymouth u3a website at:

www.plymouthu3a.org.uk

From the Administration drop-down menu at the top, select **Beacon Administration**. (Alternatively, you can go to www.u3abeacon.org.uk and get to the same place.)

The Beacon logon page looks like this. Logging on requires three bits of information:

- The name of your u3a (i.e., Plymouth)
- Your user name, which will generally be your first initial and last name, all lowercase with no spaces (e.g., the user name for John Smith would be jsmith)
- Your password. The first time you log on this would be the temporary password provided by the Beacon Administrator, but this must be changed after you log on. Use your own password for subsequent logons.

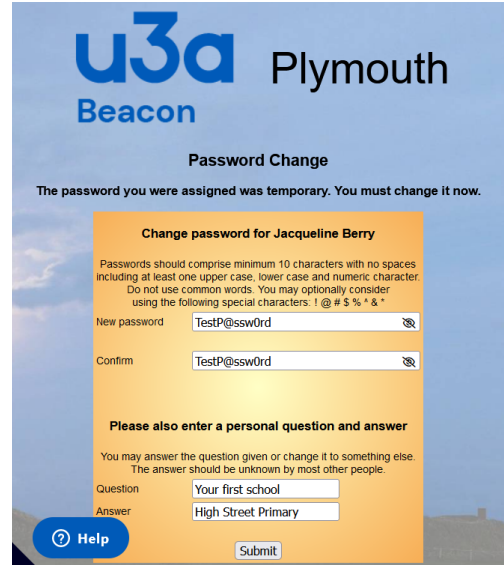


Initial Logon

Your first action on initial logon is to change the temporary password supplied to one of your choice. The change password page is presented automatically.

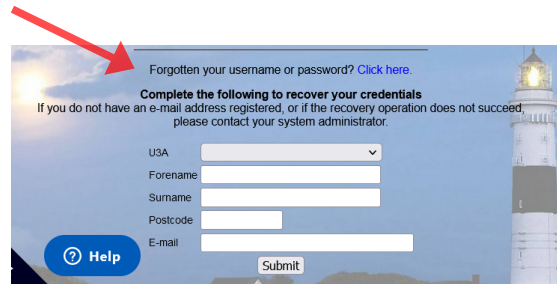
Type in your new password and confirm it in the second field. You must also choose a security question and provide the answer before the Submit button becomes available to complete the action.

Choose a strong password and please do not re-use an existing password for this site. It must be at least 10 characters in length and include at least one of each uppercase and lowercase letters and numeric characters. You may also include one or more of the special characters ! @ # \$ % ^ & *



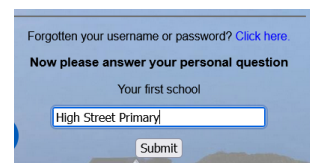
The screenshot shows the 'u3a Plymouth Beacon' logo at the top. Below it, the heading is 'Password Change' with a sub-message: 'The password you were assigned was temporary. You must change it now.' The main form area is titled 'Change password for Jacqueline Berry'. It includes instructions: 'Passwords should comprise minimum 10 characters with no spaces 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: ! @ # \$ % ^ & *'. There are two input fields for 'New password' and 'Confirm', both containing 'TestP@ssw0rd'. Below these is a section 'Please also enter a personal question and answer' with instructions: 'You may answer the question given or change it to something else. The answer should be unknown by most other people.' There are two input fields: 'Question' with 'Your first school' and 'Answer' with 'High Street Primary'. A 'Submit' button is at the bottom right, and a 'Help' button is at the bottom left.

If you make a mistake logging on, a red error message will be displayed. You have three attempts to log on, after which you must wait about 15 minutes for the system to reset. If you can't recall your logon name or password, click on the link at the bottom of the screen that says "Forgotten your username or password? [Click here.](#)"



A red arrow points to a link 'Forgotten your username or password? Click here.' in the top right of the page. Below it is a form titled 'Complete the following to recover your credentials' with a sub-message: 'If you do not have an e-mail address registered, or if the recovery operation does not succeed, please contact your system administrator.' The form has input fields for 'USA', 'Forename', 'Surname', 'Postcode', and 'E-mail'. A 'Submit' button is at the bottom right, and a 'Help' button is at the bottom left.

A form will come up to ask for your name, postcode, and other details to confirm your identity. Beacon will then ask you to answer the personal question set in your profile. If you answer that correctly, the system will send you an email reminding you of your username and providing a temporary password. Again, you'll need to set a new password after you log on successfully.



The screenshot shows a form titled 'Now please answer your personal question' with a sub-message: 'Your first school'. There is an input field containing 'High Street Primary' and a 'Submit' button at the bottom right.

If you have any other problems logging on, contact the Beacon Administrator.

Once you have logged on, the Beacon home screen appears. (See Beacon Home Screen below for options.)

Changing your Password

If you need to change your password in the future, you would choose Personal Preferences from the **Misc** menu to go to the screen where you can change your password and personal question, alter the way lists are sorted within Beacon, and change the length of the timeout period. Remember to click on the **Save, Change Password** or **Update Q&A** buttons after you've made changes. If you leave this screen without doing that, your changes will not be saved.

Click **Home** to return to the home page to choose another function.

Logging Out

If you change or add information in your record, remember to click on **Submit** to save your changes.

To log out of the system, return to the Beacon Home page, and click the **Log Out** option at the top. It is strongly recommended that every user does this before leaving Beacon.

Beacon Home Screen

The database administrator must have set you up as group leader of a specific group(s) before you can access these functions.

The Home page for a Group Leaders access looks like this:



You can click on anything showing in blue text to view the information. The group administration functions available to you are shown in the **Groups** menu:

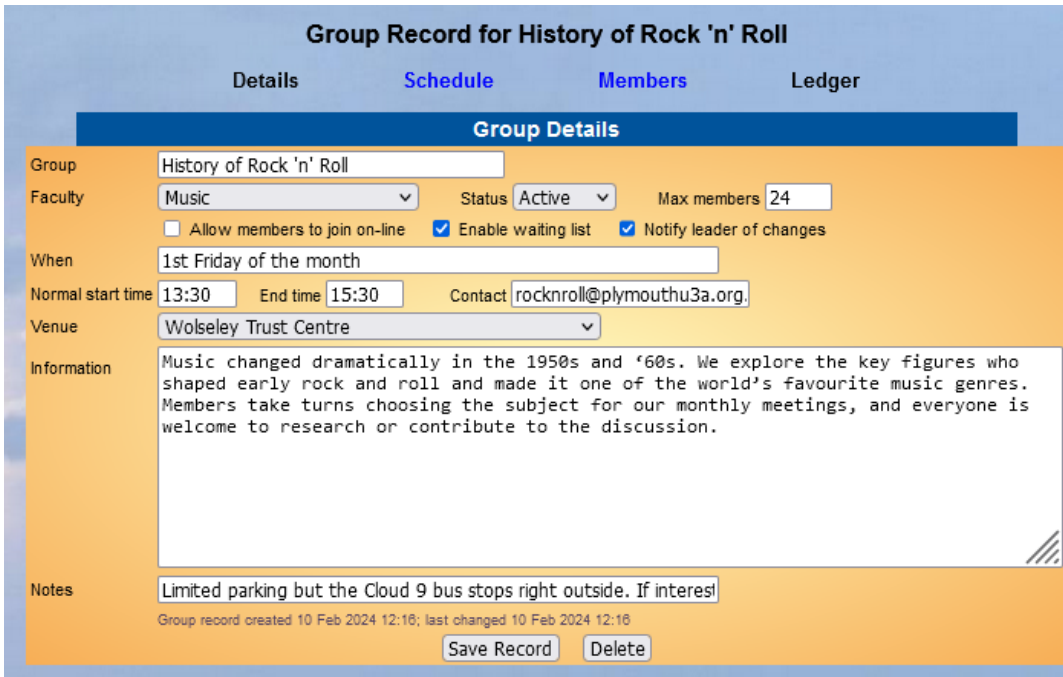
- [Groups](#) will take you to a list of all Plymouth u3a groups. From there you can access the details for the groups you lead, whose name(s) will be shown in [blue](#) to indicate a link to another screen.
- [Venues](#) will show you a list of meeting places that are used and/or available for Plymouth u3a meetings. If your venue is not listed here, contact the Group Coordinator to have it added to the list.
- [Faculties](#) will show you the list of the categories that Plymouth u3a uses to classify our interest groups to make them more easily searchable for
- [Calendar](#) will show you a listing of upcoming group meetings in chronological order. If schedule information exists for your group, your meetings will be listed here.

There is also the **Misc** menu on this screen, where you can look at a list of Plymouth u3a officers and access your own personal profile and preferences, but these are not the subject of this guide.

How to Maintain Group Details in Beacon

When you click on [Groups](#) in the home screen's **Groups** menu, you will see a list of all Plymouth u3a groups. Scroll down the list to find the name of the group that you lead, which should appear in blue as a clickable link. If it does not show up as a clickable link, it means that you are not set up as a group leader for that group. In this case, contact the Beacon Administrator by email on adminstrator@plymouthu3a.org.uk

To view and edit the details for your group, click on the name of your group. You'll see a screen like this:



The screenshot shows the 'Group Record for History of Rock 'n' Roll' interface. At the top, there are four tabs: 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Details' tab is selected, and the 'Group Details' section is highlighted in blue. The form contains the following fields and options:

- Group:** History of Rock 'n' Roll
- Faculty:** Music (dropdown)
- Status:** Active (dropdown)
- Max members:** 24
- Allow members to join on-line
- Enable waiting list
- Notify leader of changes
- When:** 1st Friday of the month
- Normal start time:** 13:30
- End time:** 15:30
- Contact:** rocknroll@plymouthu3a.org
- Venue:** Wolseley Trust Centre (dropdown)
- Information:** Music changed dramatically in the 1950s and '60s. We explore the key figures who shaped early rock and roll and made it one of the world's favourite music genres. Members take turns choosing the subject for our monthly meetings, and everyone is welcome to research or contribute to the discussion.
- Notes:** Limited parking but the Cloud 9 bus stops right outside. If interest

At the bottom, there are two buttons: 'Save Record' and 'Delete'. A small text at the bottom of the form reads: 'Group record created 10 Feb 2024 12:16; last changed 10 Feb 2024 12:16'.

This screen shows the details for the group you clicked on and allows you to change them. The options list above Group Details box provides links to the other group administration functions you can perform:

- [Schedule](#), which allows you to add your group meetings to the Plymouth u3a calendar or add details to individual meetings
- [Members](#), which allows to you to add and delete members from your group and assign one or more group leaders
- [Ledger](#), which allows you to keep a record of any financial transactions for your group (generally monies collected from members and payments for any material costs or venue hire)

Instructions follow for what information to provide for your group.

Entering Your Group's Details

The Group Details screen (see previous page) shows the main information about your group and allows you to make changes.

It's important to realise that the information you put in Beacon here is used elsewhere. Some of the details you enter may be used in public places; for example, the name and description of your group may be used in a brochure or web page to promote Plymouth u3a and attract new members. Other information will only be used within Plymouth u3a; for example, the contact information you put in your group record won't be used in public places, but it will be used to provide Plymouth u3a members with a way to get in touch with you about your group. For this reason, please read the guidelines for what to put in each field of your group's Beacon record, as explained below.

Data Field	Description	Examples
Group	(30 characters max) Official name of the group. Groups are displayed in alphabetical order, so please avoid starting with an article (the/a/an) if possible. Don't use all caps, please!	History of Rock'n'Roll
Faculty	Category for this group, chosen from the drop-down list (may be changed by admin). This will help members find a group that suits them more easily.	Music
Max members	A number set by the group leader for the maximum number of people this group can accommodate. Leave blank if no limit.	24
Allow members to join online	Can a member join this group online without contacting the group leader?	✓ (meaning yes) blank (meaning no)

Data Field	Description	Examples
Enable waiting list	Can a member join the waiting list for this group? This feature will allow the system to keep track of members who are interested in joining your group and also let the Group Coordinator know that this group has a waiting list and possibly look to start another group on this topic.	✓ (meaning yes) blank (meaning no)
Notify leader of changes	If an administrator makes a change to this group information, should the group leader be notified?	✓ (meaning yes) blank (meaning no)
When	Day of the week for meetings. Please use one of the formats shown in the examples.	<ul style="list-style-type: none"> • First Friday of the month • Alternate Tuesdays • Every Wednesday • Varies
Normal Start Time	Meeting start time in 24-hour clock format	13:30
End Time	Meeting end time in 24-hour clock format	15:30
Contact	(30 characters max) How to contact someone about joining the group, either by email or phone number. Please don't use the word "contact" in this field, as this data will often appear in a place that starts "For more information, contact:"	rocknroll@plymouthu3a.org.uk or John on 987654 <i>(if it's a Plymouth number, don't put the city code)</i>

Data Field	Description	Examples
Venue	Where this group meets. Choose from the drop-down list, which includes both specific places and general descriptions as shown below. If your venue is not shown, please contact the Group Coordinator, who can add it to the list.	<ul style="list-style-type: none"> • Wolseley Trust Centre • Various – as advised by Group Leader • Leader's home • Members' homes
Information	Description of the group used for publicity outside Plymouth u3a (25-100 words). Avoid mentioning venue or contact information.	Music changed dramatically in the 1950s and '60s. We explore the key figures who shaped early rock and roll and made it one of the world's favourite music genres. Members take turns choosing the subject for our monthly meetings, and everyone is welcome to research or contribute to the discussion.
Notes	(up to 250 characters) This field is aimed at Plymouth u3a members who may want to join the group, so it's OK to mention venues, times, group leaders' names, or other contact information.	We meet at the Rising Star on the first Friday of the month. Tea and coffee are available, as well as beer and wine! Limited parking but the Cloud 9 bus stops right outside. If interested, contact group leader John Peel: rocknroll@plymouthu3a.org.uk

How to Add Meetings to the Calendar

Beacon's Schedule function lets you add single or multiple meeting dates to the Plymouth u3a calendar and enter details for specific meetings if desired. For many groups, all that is needed for the calendar is a general entry to put the regular meetings in. Other groups may want to enter additional details for specific group meetings, such as:

- The meeting location or how to get there
- The theme or topic for a meeting
- Special events (Christmas party, a guest speaker, etc.)

There is no requirement to enter details for individual meetings and the information appears only in the Beacon calendar, which has a limited audience. However, having your regular meeting appear in the calendar can be helpful to both regular members and to the committee.

If you have not entered any group meetings, the Schedule screen will look something like this:

Home - Groups List - Calendar

Group Record for History of Rock 'n' Roll

Details Schedule Members Ledger

Group Schedule

Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Date & Time	Until	Venue	Topic	Enquiries	

Add Events

First date and time: 10/02/2024 13:30 then every 2 Weeks

Until: Number of events 1 Not beyond 31/3/2024

End time: 15:30 Exclude from public calendar

Venue: Wolseley Trust Centre Enquiries: rocknroll@plymouthu3a.org.uk

Topic:

Details:

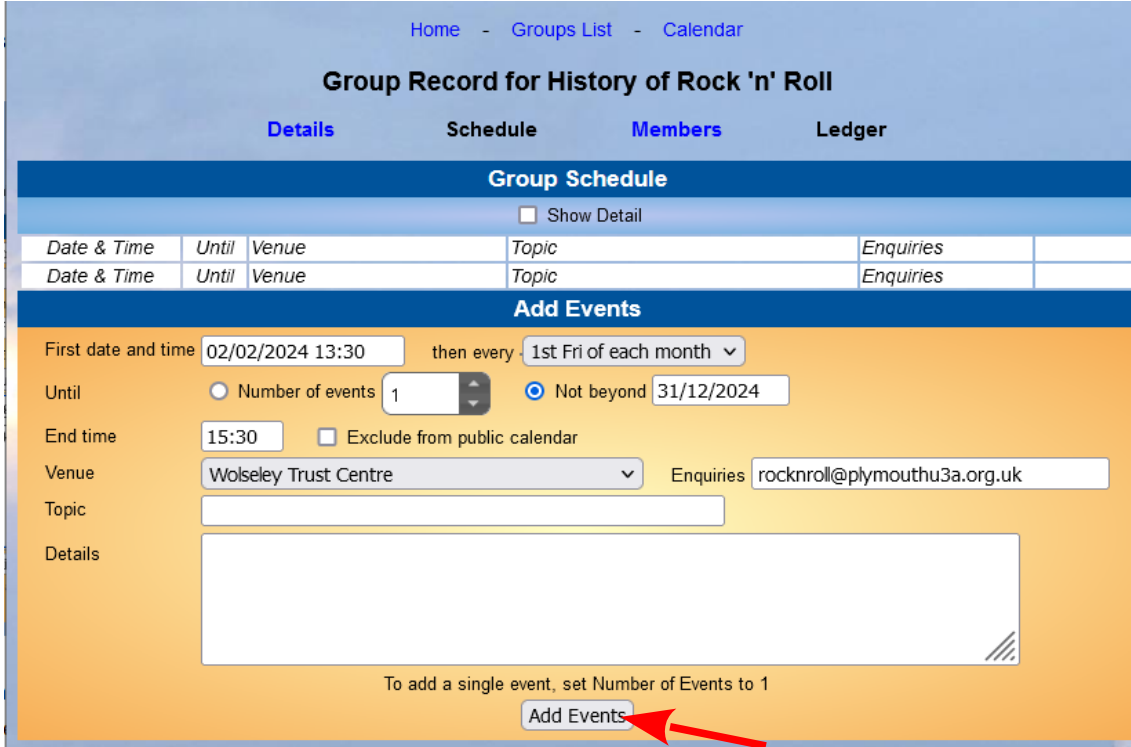
To add a single event, set Number of Events to 1

Add Events

No calendar events will be shown for your group, and the form at the bottom will show only the default information for your group and date settings.

Adding Regular Group Meetings

The simplest way to enter your regular group meetings so they appear in the Plymouth u3a calendar is to enter the date of your next meeting and then have it repeat on a regular basis. You only have to do one entry and have it fill in a whole year or more of meetings.



The screenshot shows a web interface for a group record. At the top, there are navigation links: Home - Groups List - Calendar. The main title is "Group Record for History of Rock 'n' Roll". Below the title are four tabs: Details, Schedule, Members, and Ledger. The "Schedule" tab is active, showing a "Group Schedule" section with a "Show Detail" checkbox. Below this is a table with columns: Date & Time, Until, Venue, Topic, and Enquiries. The "Add Events" section is highlighted in orange and contains the following fields: "First date and time" (02/02/2024 13:30), "then every" (1st Fri of each month), "Until" (Number of events: 1, Not beyond: 31/12/2024), "End time" (15:30, Exclude from public calendar checkbox), "Venue" (Wolseley Trust Centre), "Enquiries" (rocknroll@plymouthu3a.org.uk), "Topic" (blank), and "Details" (text area). A red arrow points to the "Add Events" button at the bottom of the form. A note at the bottom of the form says: "To add a single event, set Number of Events to 1".

For example, in the screen above:

- The date and time of the next Rock 'n' Roll meeting is entered in the **First date and time field** as 02/02/24 13:30
- Since this group meets monthly, subsequent meetings are added in the **then every** field on the 1st Friday of each month.
- The regular meetings are added to the calendar through the end of the year, by clicking the button for **Not beyond** and putting the last day of the year.
- The other fields are left with the default information for this group's **End time**, **Venue**, and **Enquiries** and left blank for **Topic** and **Details**.
- When all the data is entered in the fields as required, the group leader clicks on the **Add Events** button at the bottom to add the meetings to the calendar. The list will then appear at the top of this Schedule screen (see below), where they can be edited or deleted individually (see "Entering or Changing Details for a Specific Meeting").

This is how the meetings for the History of Rock 'n' Roll would look when they are entered as above:

Home - Groups List - Calendar

Group Record for History of Rock 'n' Roll

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Schedule

Show Detail

Date & Time	Until	Venue	Topic	Enquiries	
Fri 1 Mar 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 5 Apr 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 3 May 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 7 Jun 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 5 Jul 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 2 Aug 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 6 Sep 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 4 Oct 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 1 Nov 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete
Fri 6 Dec 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk	edit delete

Add Events

First date and time: then every

Until: Number of events Not beyond

End time: Exclude from public calendar

Venue: Enquiries:

Topic:

Details:

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

Once the regular meetings are entered in this way, they can be edited or deleted as individual meetings by clicking on **edit** or **delete**. Read on if you want to know how to do this.

If you are happy with the meetings as they are, you can go to another Beacon screen for this group using the menus below the group name (Details / Schedule / Members / Ledger) or use the menu at the top (Home / Groups List / Calendar) to log out, manage another group's information, or view the Plymouth u3a calendar.

Deleting a Meeting from the Calendar

There may be times when you want to delete a specific meeting from the calendar. For example, if one of your group meetings falls on a bank holiday, you may want to skip that meeting and delete it from the calendar to avoid confusion.

To delete a meeting or event, find it by date on the list and click on the **delete** option. Beacon will ask you to confirm this action by asking "Do you really want to delete this event?". Click **Delete** if you do and **Cancel** if you don't.

Entering Details for a Specific Meeting

You can add additional details to the calendar for specific group meetings or events if desired. For example, your group may be meeting in a different place than usual or perhaps has a guest speaker or special activity. You can enter details when you initially add a meeting to the calendar or edit an existing meeting.

To edit an existing meeting, find it on the list and click edit. A data entry box like this will pop up to allow you to change the details for this event.

The screenshot shows the 'Group Schedule' interface with a table of meetings and a detailed form for editing a meeting on 6/9/2024 at 13:30. The table lists meetings from March to December 2024, all at 13:30 at Wolseley Trust Centre. The selected meeting's details are as follows:

Date & Time	Until	Venue	Topic	Enquiries
Fri 1 Mar 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 5 Apr 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 3 May 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 7 Jun 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 5 Jul 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 2 Aug 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 6 Sep 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 4 Oct 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 1 Nov 2024 13:30	15:30	W		
Fri 6 Dec 2024 13:30	15:30	W		

The details form for the selected meeting (6/9/2024 13:30) includes:

- Date/time: 6/9/2024 13:30
- End time: 16:30
- Exclude from public calendar:
- Venue: (dropdown menu)
- Enquiries: rocknroll@plymouthu3a.org.uk
- Topic: Jailhouse Rock at the Rising Star
- Details: For the September meeting, we have permission to listen to the famous live version of Jailhouse Rock on the pub's sound system, and the Rising Star will be laying on a light buffet for us! This meeting will last an hour longer than normal.
- Buttons: Update, Cancel

A red arrow points to the 'Update' button.

For this example, the following items have been edited for the meeting on the 6th of September:

- End time (this meeting will last an hour longer than usual)
- Venue (the normal venue won't be used, so it's deleted here)
- Topic (event name and location added)
- Details (a description of the event added)

Once the details are correctly typed in, click the Update button at the bottom to change the details for this Trust meeting. The information will be updated in the Group Schedule list as shown here:

Group Record for History of Rock 'n' Roll

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Schedule

Show Detail

Date & Time	Until	Venue	Topic	Enquiries
Fri 1 Mar 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 5 Apr 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 3 May 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 7 Jun 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 5 Jul 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 2 Aug 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 6 Sep 2024 13:30	16:30		Jailhouse Rock at the Rising Star	rocknroll@plymouthu3a.org.uk edit delete
Fri 4 Oct 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 1 Nov 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete
Fri 6 Dec 2024 13:30	15:30	Wolseley Trust Centre - map		rocknroll@plymouthu3a.org.uk edit delete

Add Events

First date and time: then every

Until: Number of events Not beyond

End time: Exclude from public calendar

Venue: Enquiries:

Topic:

Details:

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

The edits will also appear in the Plymouth u3a calendar:

Home - Groups

Calendar

Show: all venue

From To

Show Detail

Date & Time	Until	Group	Venue	Topic	Enquiries
Thu 5 Sep 2024 10:30	12:15	Lipreading	Online		Jenny on 311860 (after 11am)
Thu 5 Sep 2024 10:30	12:00	Italian Conversation 1	Plymouth Athenaeum - map		Janet on 776731
Thu 5 Sep 2024 10:30		MUD Walks	Various - as advised by Group Leader		mud@reffell.org.uk
Thu 5 Sep 2024 11:00	13:00	Watercolour Painting	St Andrews Church Lower Hall - map		jacintapc@blueyonder.co.uk
Thu 5 Sep 2024 14:00	16:00	German Conversation	Members' homes		sally.macnaughtan@gmail.com
Fri 6 Sep 2024 10:00	12:00	Russian Conversation	Members' homes		sally.macnaughtan@gmail.com
Fri 6 Sep 2024 13:30	16:30	History of Rock 'n' Roll		Jailhouse Rock at the Rising Star	rocknroll@plymouthu3a.org.uk
Fri 6 Sep 2024 14:00	16:00	Country Dancing	Colebrook Community Centre - map		Janet on 07791 230587
Fri 6 Sep 2024 14:00	16:00	Spanish 1	Maritime Inn - map		lydia78@tiscali.co.uk
Sat 7 Sep 2024 10:30	12:30	Weekenders	Theatre Royal - map		Margaret on 771371
Mon 9 Sep 2024 09:30	12:00	The Hive (volunteers' group)	Duke of Cornwall Hotel - map		Sandra 563551 Trish 344759
Mon 9 Sep 2024 10:00	11:00	Computers and IT Help Desk	Duke of Cornwall Hotel - map		Tony on 07540 267689
Mon 9 Sep 2024 11:00	12:00	Spanish Conversation-Advanced	Leader's home		annewall@hotmail.co.uk

Data Entry Fields for the Schedule

A description of the data entry fields is provided in the table below to help you understand how to use the Schedule function.

Data Field	Description	Example
First date and time	The default is the current date and the regular start time for your group meetings. Change this to the date and time of the next meeting – or single event – you wish to add using the calendar provided. (You may need to scroll the screen up or down to see the calendar properly.)	Dates are entered in dd/mm/yy format and times use the 24-hour clock: 02/02/24 13:30
then every	This lets you set up multiple events that happen at the same time and place on a regular basis. Use the up and down arrows to set the frequency and the drop-down menu to select the time frame (days, weeks, or months or a particular day in each month).	To set meetings every month on a particular day starting from the date set above, choose the last option showing the day of the month, e.g.: 1st Fri of each month (If you meet twice a month on a specific day, you'll need to do this twice.) To set meetings every other week starting from the date set above, you'd enter 2 as the number and Weeks as the unit. Likewise, if you meet every week on the same day, you'd enter 1 as the number and Weeks as the unit.
Until	This lets you specify whether you are adding multiple events (15 max) or just one. You can either choose a number, or select a date that the repeating meetings will run until.	To set up a single event on the date set above, enter 1 in the Number of events block . To set up 12 events starting from the date set above, enter 12 in the Number of events block . To set up meetings that repeat until a specific date, click the Not beyond button and choose a date in the future from the calendar.
End time	Enter the end time of the event(s) using the Choose Time box.	Use 24-hour clock format: 15:30

Data Field	Description	Example
Exclude from public calendar	Tick this box if you do not want your meeting or event to appear in the Plymouth u3a calendar.	✓ (exclude from calendar) blank (include in calendar)
Venue (optional)	This will default to the venue entered in your group's details. If you want to change it to another Plymouth u3a venue, choose from the drop-down list. Venues that are used for one-off events should not be added to this list.	Examples: •Wolseley Trust Centre •Various – as advised by Group Leader •Leader's home •Members' homes
Enquiries (optional)	How to contact someone about this event, either email or phone number (30 characters max). This defaults to the contact details from the group's details.	Default might be: rocknroll@plymouthu3a.org.uk but you could change it to: Phone John on 123456
Topic (optional)	Topic or special venue for the event (150 characters max). This is useful if your group meets at different places or has a specific theme or guest speaker for different meetings.	Elvis: King of Rock'n'Roll? or Chuck Berry tribute act at Plymouth Pavilions
Details (optional)	Further information about event, if required, such as a change in time or venue, when and where to meet, etc.	For the September meeting, we have permission to listen to the famous live version of Jailhouse Rock on the pub's sound system, and the pub will be laying on a light buffet for us!

How to Keep Your Membership List

You can keep your group membership list on Beacon, which provides a way for you to email your members, add additional leaders to the group, and ascertain whether your group members are current Plymouth u3a members. The screen for the Members function looks something like this:

The screenshot shows the 'Group Record for History of Rock 'n' Roll' interface. It has tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. Under 'Members', there are checkboxes for 'Joined members' and 'Waiting list', both of which are checked. Below this is a table of group members with columns for 'Select', 'Member No.', 'Name', 'Address', 'Telephone', 'Mobile', 'Status', 'Waiting', and an action link. The table lists 8 members, including Tricia Abrahams, Neil Armstrong, Carolyn Barrett Browning, Alexander Bell, Annie Driver, Freda Kahlo, John Peel, and Marj Simpson. Below the table is a control bar with a dropdown menu set to 'Do with selected' and a 'Send E-mail' button. Below that, it says '8 members (0 selected)'. There are two sections for adding members: 'Add member by name' with a dropdown menu and an 'Add' button, and 'Add member by membership number' with a text input field and an 'Add' button. Two red arrows point to the 'Add' buttons in both sections.

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	
<input type="checkbox"/>	1002	Tricia Abrahams	15 Some Street, Demoton Village, DM13 6GG		0707 456 1005	Current		remove - make leader
Emergency contact: son 0707 456 1015								
<input type="checkbox"/>	1003	Neil Armstrong	1 Access Avenue, Demoton, DM11 1PB	0123 456 1006	0707 456 1006	Current		remove - make leader
Emergency contact: Albert Atheist 0707 456 1016								
<input type="checkbox"/>	1004	Carolyn Barrett Browning	27 Kirkgate, North Demoton, DM9 2ZZ	0123 456 1029	0707 456 1029	Current		remove - make leader
Emergency contact: David Barrett 0707 456 1030								
<input type="checkbox"/>	1074	Alexander Bell	199 the broadway, Near Little London, North Demoton, DM7 2TA			Current		remove - make leader
<input type="checkbox"/>	1010	Annie Driver	1 Bleaker St, Demoton, DM1 5XM	0123 456 1077	0707 456 1077	Current		remove - make leader
Emergency contact: Tomas Driver 0707 456 1078								
<input type="checkbox"/>	1064	Freda Kahlo	The Gallery High Street, Demoton, DM12 7RB	0123456 1064	0707 456 1064	Current		remove - make leader
<input type="checkbox"/>	1081	John Peel	123 Bourbon Street, Demoton, DM10 9XX	123456	123456	Current	Leader	remove - cancel leader
Emergency contact: My mom								
<input type="checkbox"/>	1078	Marj Simpson	5 Springfield Road, Demoton, DA1 3KM			Current		remove - make leader

Adding and Removing Group Members

You can add a new member to your group by name or by membership number.

Go to **Add member by name** below the list area and select an individual's name from the drop-down list and then click **Add**. If the name you are trying to add is not listed, it means that they are not a current member of Plymouth u3a and you cannot add them to your group.

To add one or more members by number, go to the **Add member by membership number** box and type in the number(s) of the member(s) you want to add. When you click on **Add**, a box will pop up showing the names of the member(s) you entered and ask you to confirm that that is correct.

Once you have added a name, it will appear in your membership list.

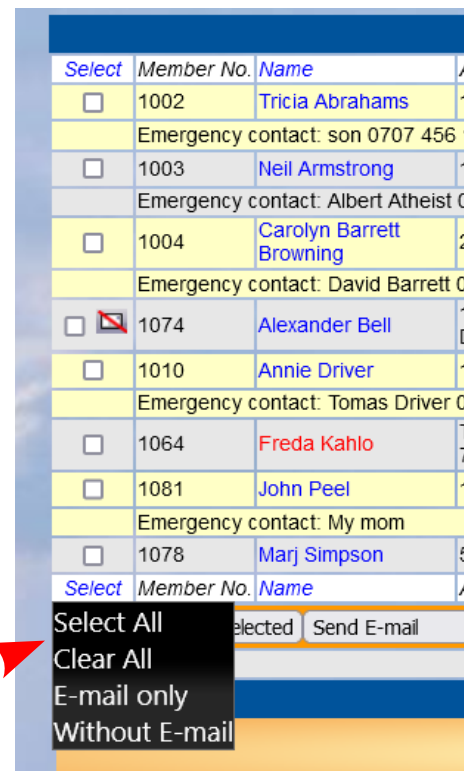
- The membership list shows the names of all members who are either in your group or on the waiting list (if your group uses the waiting list feature). Use the **Joined members** and **Waiting list** tick boxes above the list to show or hide the names of people in each category.
- A name that has a crossed-out envelope symbol in the Select column (like Alexander Bell) indicates that the member does not have an email address on record, so you will not be able to contact this member through the Beacon email system.
- A name that appears in red (like Freda Kahlo in the list above) indicates that that member has not renewed for the current year.
- The **Address**, **Telephone**, and **Mobile** columns will show members' contact details only if they have indicated that they are willing to share these with others*.
- The **Waiting** column shows the date that a member joined the online waiting list (if you have activated that feature), letting you know the order in which people joined the list. It also shows which of the group members are also group leaders.
- The final column has a clickable [remove](#) item that allows you to remove a member from your group. If you click this, you will be asked to confirm that you want to remove this member before the action is completed.
- The final column also has a clickable [make leader](#) item that allows you to designate another member of group as a group leader. If you click this, the item will then read [cancel leader](#) to allow you to remove that person as leader if necessary. Group leaders are noted in the Waiting column as "Leader".
- You can use the menu at the bottom of the list to perform different actions with your membership list, such as emailing (see below), downloading a spreadsheet or PDF of your list, or removing several group members at once.

*It's important to note that members' details are hidden unless they specifically ask them to be visible. They are hidden as a pre-set system default. Members can untick this option in their own membership record if they so choose, thereby giving their permission for group leaders to see their personal details. In keeping with the General Data Protection Regulation (GDPR), only those u3a committee members with a very high level of Beacon access can view members' details, and these people will have signed a non-disclosure agreement.

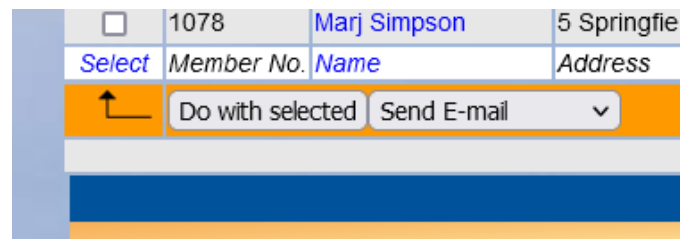
Sending Emails to Group Members

You can send emails to any or all members of your group through the Beacon email feature. Once you select the member(s) you want to email from the list, you can compose your email and send it from Beacon automatically. One advantage of using this system is that email addresses of members are automatically hidden from other members. Also, using the Beacon system to send bulk emails will avoid your own Internet Service Provider assuming that you are sending spam!

Choose the group members you wish to email by ticking the boxes in the **Select** column. If you want to email everybody in your group, click on the **Select** item at the top or bottom of that column to get a pop-up menu and choose **Select All** (or **E-mail only** if you have members without email).



Once the right members are selected, make sure that the action menu shows "Send E-mail", then click on "Do with selected" to open up the email screen and compose your message.



Your email address will appear at the top of the message so you can confirm that it is correct. Members' emails addresses will automatically be hidden from each other to prevent data protection breaches.

Follow the general rules of email etiquette (and avoid being regarded as spam) by providing a meaningful subject line, such as "Plymouth u3a XXX Group, Next Meeting Details".

You can personalise the email if you like by addressing recipients as "Dear #FAM" to use the member's familiar name to start your email.

How to Keep Financial Records in the Ledger

Keeping a record of your group's financial transactions with Beacon's Ledger function is straightforward. Transactions are recorded simply as money in or money out (received or paid). If your group has costs for things like room hire or materials, it's easy to enter them into the Beacon ledger and track your reimbursements from members.

It's important to keep this record because the Plymouth u3a treasurer will ask to you summarise your group's financial transactions at the end of the u3a fiscal year on March 31st. The Beacon ledger allows you to download a report that you can use for this purpose.

Clicking on the Ledger option brings up the ledger screen, which will look similar to this:

The screenshot shows the 'Group Ledger' interface for 'History of Rock 'n' Roll'. It features a navigation bar with 'Details', 'Schedule', 'Members', and 'Ledger' options. The main area displays a table of transactions from 01/01/23 to 31/03/2024. Below the table is a 'Download Excel' button and an 'Add transaction' form with fields for Date, Payee, Detail, In, and Out, and a 'Save' button.

Date	Payee	Detail	In	Out	Balance	
		Brought forward			£0.00	
7 Apr 2023	John Peel	Member contributions	£20.00		£20.00	edit - delete
5 May 2023	John Peel	Member contributions	£20.00		£40.00	edit - delete
2 Jun 2023	John Peel	Member contributions	£20.00		£60.00	edit - delete
1 Jul 2023	Wolseley Trust	Room hire		£60.00		edit - delete
7 Jul 2023	John Peel	Member contributions	£20.00		£20.00	edit - delete
4 Aug 2023	John Peel	Member contributions	£20.00		£40.00	edit - delete
1 Sep 2023	John Peel	Member contributions	£20.00		£60.00	edit - delete
1 Oct 2023	Wolseley Trust	Room hire		£60.00		edit - delete
6 Oct 2023	John Peel	Member contributions	£20.00		£20.00	edit - delete
3 Nov 2023	John Peel	Member contributions	£20.00		£40.00	edit - delete
3 Nov 2023	John Peel	Member contributions for DJ	£45.00		£85.00	edit - delete
1 Dec 2023	John Peel	Member contributions	£20.00		£105.00	edit - delete
1 Dec 2023	Rock & Roll Fantasy	DJ for Christmas party		£45.00	£60.00	edit - delete
1 Jan 2024	Wolseley Trust	Room hire		£60.00		edit - delete
5 Jan 2024	John Peel	Member contributions	£20.00		£20.00	edit - delete

Download Excel

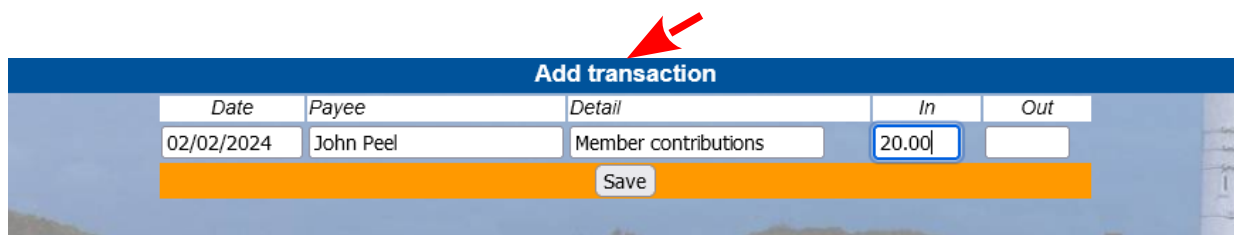
Date	Payee	Detail	In	Out
02/02/2024	John Peel	Member contributions	20.00	

Save

You can record expenses for room hire, materials, or other costs for running the group, as well as recording the monies collected from group members to cover these expenses. In the example above, the group pays £60 per quarter for room hire and the group leader collects £20 per month from meeting attendees to cover this cost. Additionally, the group agreed to split the £45 cost of a DJ for their Christmas party, so the group leader collected this amount from members to cover that expense. Ideally, the receipts and payments balance out over the course of year!

Adding Transactions

To add a new transaction to your ledger, use the **Add transaction** form at the bottom of the screen.



The screenshot shows a form titled "Add transaction" with a red arrow pointing to the title. The form contains the following fields:

Date	Payee	Detail	In	Out
02/02/2024	John Peel	Member contributions	20.00	

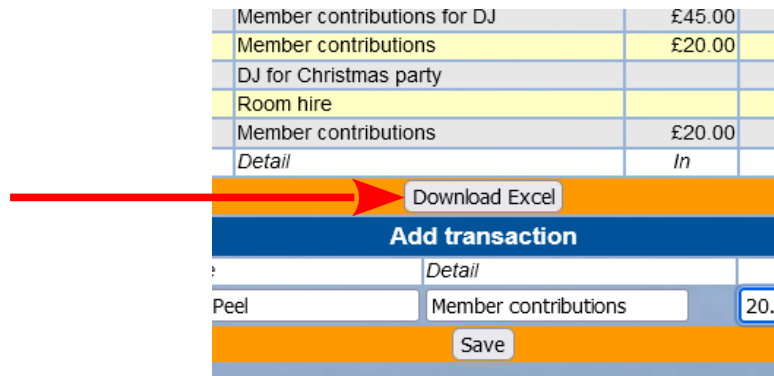
Below the table is a "Save" button.

Enter the following information for each transaction:

- The date of the transaction
- Who was paid – the organisation or person you paid for room hire, products, or services or, in the case of reimbursements from group members, your name or that of whomever collected the reimbursements to pay for the expenses
- A description of the debit or credit – for example, “Member contributions” for the reimbursements you collect from your group members
- The amount of the transaction, which will be either a credit (In) or a debit (Out)
- When you have entered the transaction details, don’t forget to click **Save** to save your entry!

Creating an End-of-Year Account Summary

At the end of the financial year, the Plymouth u3a treasurer asks all group leaders for a summary of the year's income and expenses. When you have entered all your expenses and collections for the year, you can print out a report for this purpose from your Beacon ledger. Click on the **Download Excel** item at the bottom of the ledger to download a spreadsheet report that you can send to our treasurer.



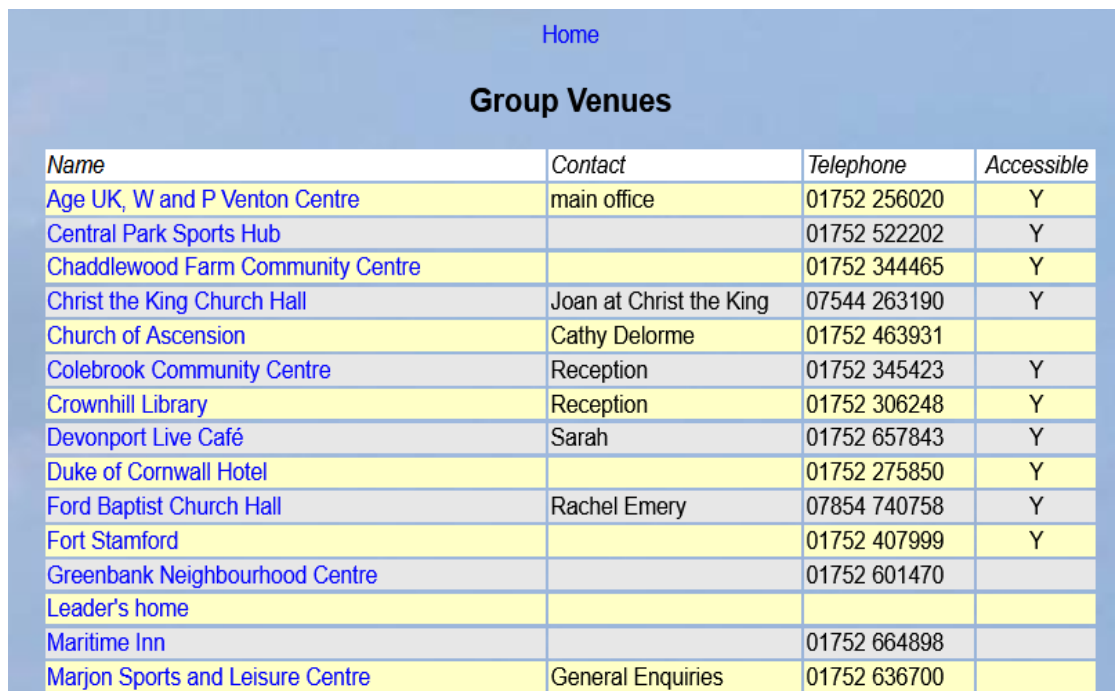
Below is an example of what the report downloaded from Beacon looks like.

	A	B	C	D	E	F
1	Plymouth U3A History of Rock 'n' Roll	Ledger				
2	1/04/2023 - 31/12/2024					
3						
4	Date	Payee	Detail	In	Out	Balance
5			Brought forward			0
6	07/04/23	John Peel	Member contributions	20.00		20.00
7	05/05/23	John Peel	Member contributions	20.00		40.00
8	02/06/23	John Peel	Member contributions	20.00		60.00
9	01/07/23	Wolseley Trust	Room hire		60.00	0.00
10	07/07/23	John Peel	Member contributions	20.00		20.00
11	04/08/23	John Peel	Member contributions	20.00		40.00
12	01/09/23	John Peel	Member contributions	20.00		60.00
13	01/10/23	Wolseley Trust	Room hire		60.00	0.00
14	06/10/23	John Peel	Member contributions	20.00		20.00
15	03/11/23	John Peel	Member contributions	20.00		40.00
16	03/11/23	John Peel	Member contributions for DJ	45.00		85.00
17	01/12/23	John Peel	Member contributions	20.00		105.00
18	01/12/23	Rock & Roll Fantasy	DJ for Christmas party		45.00	60.00
19	01/01/24	Wolseley Trust	Room hire		60.00	0.00
20	05/01/24	John Peel	Member contributions	20.00		20.00
21						
22						
23						

How to View Venue Information

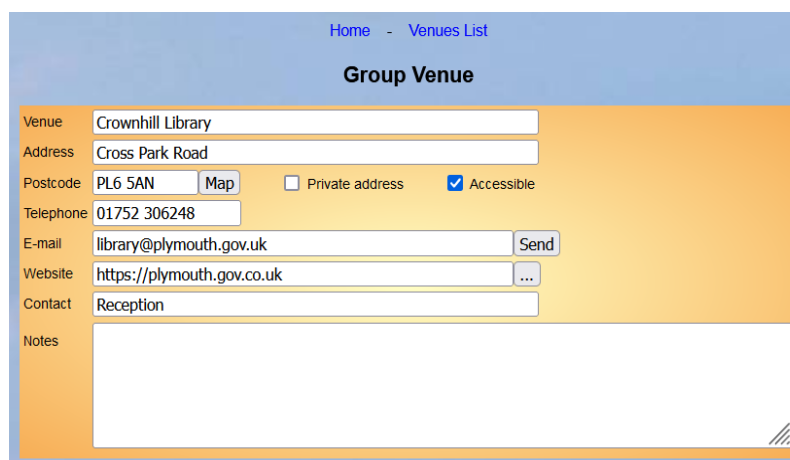
A list of the venues used by and/or available for Plymouth u3a group meetings is kept on Beacon. This may be useful when a group leader is looking for a new or alternative venue. Of course, this is not a list of all possible venues in the Plymouth area. If you know of a venue that is not listed or can provide further details that should be added to an existing venue's listing, please contact the Beacon Administrator who can add venues or amend details.

On the Beacon Home page, one of options under **Groups** is [Venues](#). Click on that option and you will get a screen similar to this that shows the list of current venues:



Name	Contact	Telephone	Accessible
Age UK, W and P Venton Centre	main office	01752 256020	Y
Central Park Sports Hub		01752 522202	Y
Chaddlewood Farm Community Centre		01752 344465	Y
Christ the King Church Hall	Joan at Christ the King	07544 263190	Y
Church of Ascension	Cathy Delorme	01752 463931	
Colebrook Community Centre	Reception	01752 345423	Y
Crownhill Library	Reception	01752 306248	Y
Devonport Live Café	Sarah	01752 657843	Y
Duke of Cornwall Hotel		01752 275850	Y
Ford Baptist Church Hall	Rachel Emery	07854 740758	Y
Fort Stamford		01752 407999	Y
Greenbank Neighbourhood Centre		01752 601470	
Leader's home			
Maritime Inn		01752 664898	
Marjon Sports and Leisure Centre	General Enquiries	01752 636700	

Clicking on the name of a venue will bring up its details in a screen like this:



Home - Venues List

Group Venue

Venue:

Address:

Postcode: Private address Accessible

Telephone:

E-mail:

Website:

Contact:

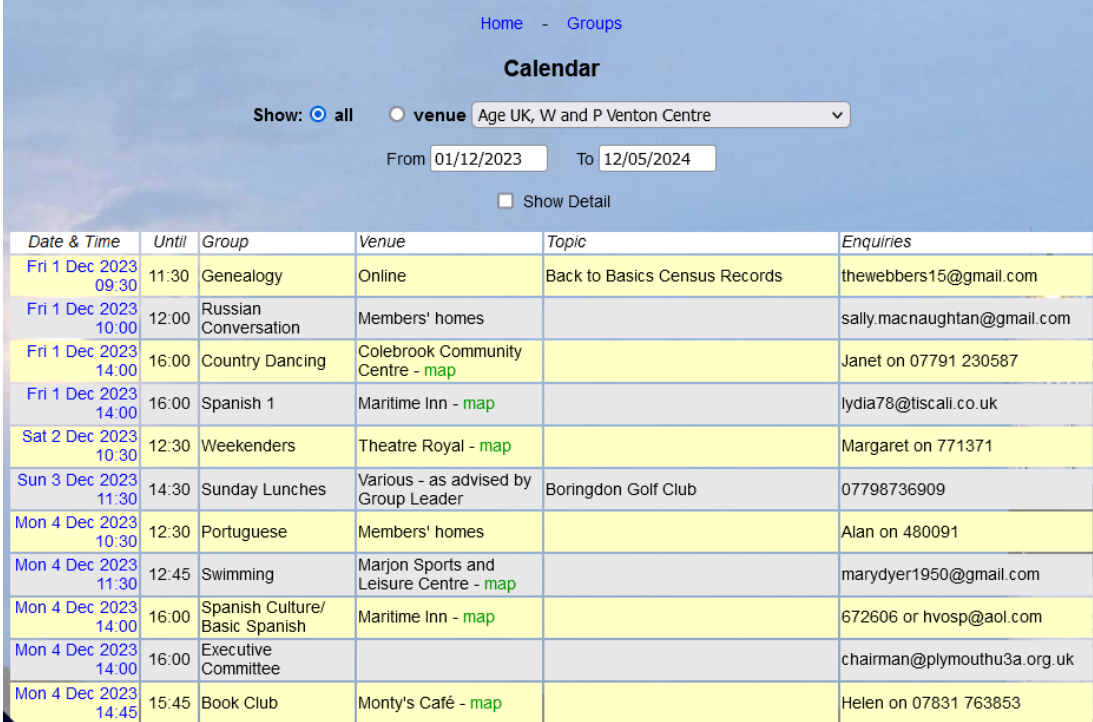
Notes:

If a postcode has been entered for the venue, Beacon will show you a map of the location when you click on **Map**.

How to View the Plymouth u3a Calendar

Any Plymouth u3a member can view the calendar of group meetings if they are registered on Beacon. Group meetings and other events appear in the calendar when they are added to Beacon from the Group Schedule function.

On the Beacon Home page, one of options under **Groups** is [Calendar](#). Click on that option the current calendar of events, which looks something like this:



Date & Time	Until	Group	Venue	Topic	Enquiries
Fri 1 Dec 2023 09:30	11:30	Genealogy	Online	Back to Basics Census Records	thewebbers15@gmail.com
Fri 1 Dec 2023 10:00	12:00	Russian Conversation	Members' homes		sally.macnaughtan@gmail.com
Fri 1 Dec 2023 14:00	16:00	Country Dancing	Colebrook Community Centre - map		Janet on 07791 230587
Fri 1 Dec 2023 14:00	16:00	Spanish 1	Maritime Inn - map		lydia78@tiscali.co.uk
Sat 2 Dec 2023 10:30	12:30	Weekenders	Theatre Royal - map		Margaret on 771371
Sun 3 Dec 2023 11:30	14:30	Sunday Lunches	Various - as advised by Group Leader	Boringdon Golf Club	07798736909
Mon 4 Dec 2023 10:30	12:30	Portuguese	Members' homes		Alan on 480091
Mon 4 Dec 2023 11:30	12:45	Swimming	Marjon Sports and Leisure Centre - map		marydyer1950@gmail.com
Mon 4 Dec 2023 14:00	16:00	Spanish Culture/ Basic Spanish	Maritime Inn - map		672606 or hvosp@aol.com
Mon 4 Dec 2023 14:00	16:00	Executive Committee			chairman@plymouthu3a.org.uk
Mon 4 Dec 2023 14:45	15:45	Book Club	Monty's Café - map		Helen on 07831 763853

This screen has some features you may find useful:

- Search by venue using the **venue** drop-down list at the top
- Search by date by specifying a date range in the **From** and **To** boxes
- See additional details about meetings by ticking the box for **Show Detail**
- Clicking on the blue date in the first column will show the record for that particular event and any further details that may be available
- Many venues have a link called [map](#), which will open another tab showing a map of the venue's location

Other Sources of Beacon Information

The Beacon Home page has three additional items at the foot of the page that point you to help and additional information about the Beacon system.

- **U3A Beacon Users Forum**

This take you to an online forum for Beacon support questions. Before adding anything to the forum, in the first instance please send all queries to the Plymouth u3a's Beacon Administrator on: administrator@plymouthu3a.org.uk He or she may be able to answer your question or resolve the problem.

- **Beacon User Guide**

This link takes you to the Beacon Help Centre, where you can find a lengthy PDF that describes the administration functions of the whole Beacon system, including many features that will not be accessible (or useful!) to group leaders.

- **Beacon Website**

This link takes you to the main Beacon website that has information about what Beacon is, why it was developed, and how it can help manage and protect the data needed to run a u3a efficiently.