

# Beacon Training

# Agenda

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- 3. Installing Beacon
- 4. Logging into Beacon
- 5. Beacon Home Page
- 6. Groups List
- 7. Group Record
- 8. Emailing
- 9. Miscellaneous

# Purpose Of Beacon

- Beacon is an on-line management system created and used by u3as.
- Beacon system carried out the following functions:
  - Membership Management
  - Groups Management
  - Finance Management
  - Email Communications
- This training course is designed for use with new and potential Group Leaders

# Installing Beacon

- Beacon can be installed by anyone using a browser.
- To access Beacon the system user must have been allocated a username and temporary password by the site administrator.
- To reach the Admin page the user should insert the following url into their browser:
  - <https://u3abeacon.org.uk>

# Logging into Beacon

- The initial user should complete 3 tables on the Admin page:
  - Username (text)
  - Password (text)
  - U3a region (dropdown list)
- On first entry the user should put temporary password in field and will then be asked to complete a personal replacement for the password and complete a 'personal question and answer' request.
- When complete re-login at admin page with personal password.

# u3a Beacon

## Administration

u3a

Username

Password

Passwords are case sensitive

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

 Help

# Home Page

- Administration page listing multiple 'linked' features under 5 separate headings.
  - Membership
  - Groups
  - Finance
  - Miscellaneous
  - Setup
- Access to some headings dependant on role being used (i.e. G Leader)
- Group Leader normally sees Groups (4 sub-headings) and Miscellaneous (u3a Officers and personal preferences sub-headings)

## Administration

You are logged in as Adrian Ditchburn [Log Out](#)

### Membership

[Members](#)  
[Add new member](#)  
[Membership renewals](#)  
[Recent members](#)  
[Non-renewals](#)  
[Membership cards](#)  
[Addresses export](#)  
[Statistics](#)

### Groups

[Groups](#) ←  
[Venues](#)  
[Faculties](#)  
[Calendar](#)

### Finance

[Ledger \(by account\)](#)  
[Ledger \(by category\)](#)  
[Ledger \(by group\)](#)  
[Add transaction](#)  
[Transfer money](#)  
[Credit batches](#)  
[Reconcile account](#)  
[Financial statement](#)  
[Groups statement](#)  
[Gift Aid declaration](#)

### Misc

[Audit log](#)  
[Gift aid log](#)  
[u3a Officers](#)  
[Public links](#)  
[Data export & backup](#)  
[E-mail delivery](#)  
[Personal preferences](#)

### Set up

[System users](#)  
[Roles and privileges](#)  
[System settings](#)  
[System messages](#)  
[Finance accounts](#)  
[Finance categories](#)  
[Membership classes](#)  
[Member statuses](#)  
[Poll](#)

[u3a Beacon Users' Forum](#)

[Beacon User Guide](#)

[Beacon Website](#)

 [Help](#)

Hover mouse over captions for more information





# Groups Listing

- On Selecting 'Groups' under the Groups heading you are taken to the Groups Listing page where the list of 'active' groups are alphabetically arranged.
- This page details a table with 9 columns and an alphabet across the page horizontal. Scroll down or select the letter in the horizontal alphabet to reach groups starting with the same letter.
- Column 1 allows you to select one or more groups to carry out an action
- Column 2 contains the group name, if in blue, which can be selected
- Column 6 lists members name having Group Leader permissions (can be more than one)
- Columns 7, 8 and 9 detail the number of group members, the max number of attending members and any remaining in the 'waiting list'.



[Home](#) - [Add New Group](#)

## Groups

Faculty

Show active only

**i** 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
<b>▲ ▼</b>	<b>A</b>							
<input type="checkbox"/>	Adventures on Trains	Y	Various	various/monthly	Stewart White	28	0	
<input type="checkbox"/>	ANCIENT WORLD	Y	Mon 1400	Perdiswell Young Peoples Leisure Club	Ray Aspden	26	30	
<input type="checkbox"/>	Art - Oil Painting +	Y	Wednesdays 13.00	Lyppard Grange Hub	Helen Barton	17	0	
<input type="checkbox"/>					Christine Scott			
<input type="checkbox"/>	ART AND PHILOSOPHY	Y	Thurs 1000	BRMC - Meeting Room	Michael Lafferty	15	15	2
<input type="checkbox"/>					Laurence Wale			
<input type="checkbox"/>	Art Discussion	Y	Wednesday	The Hive	Val Kennewell	15	13	1
<input type="checkbox"/>	Art in the Jubilee Room	Y	Wednesdays 10am	Ombersley Memorial Hall	Jacki Ager	10	0	
<input type="checkbox"/>	ART Painting - Basic 2	Y	Wed 1000	Anchor Inn	Robert Young	8	15	
<input type="checkbox"/>	ART Painting For Pleasure	Y	Mon 1000	Brmc - Sunshine Room	Roger Carter	10	12	
<b>▲ ▼</b>	<b>B</b>							



**?** Help



# Group Record

- Each Group listed under the group listing can be accessed by selecting the title (in blue). This will take you to the Group Record.
- The Group Record has 4 main functions:
  - Details
  - Schedules
  - Members
  - Ledger
- Only someone with a specific role permission can create and delete groups. Historically this has been the Groups Coordinator now the Groups liaison officer.

## Group Record for Tech Surgery for Non-Techies

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

### Group Details

Group

Faculty  Status  Max members

Allow members to join on-line    Allow members to leave on-line

Notify leader of changes

Enable waiting list    Display waiting list by default

When

Normal start time  End time  Enquiries

Venue

Information

Notes

Group record created 8 Sep 2019 16:32; last changed 2 Apr 2025 10:25



# Group Members Page

- The Members page displays the list of members of the group
- There are 9 columns per entry in the page beginning on the left with a select button column for use with members in conjunction with button lower down (Do with Selected) if you wish to email, download registers or removing members from the group.
- The next 5 columns contain personal details of the member
- Columns 7 and 8 record current status of member and whether the member is on the waiting list
- Column 9 allows leader to cancel member and set or cancel group leader status
- Finally 2 selectable buttons for adding members by name or u3a number



[Home](#) - [Groups List](#)

## Group Record for Tech Surgery for Non-Techies

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

There are no Waiting Members

Group Members

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	
<input type="checkbox"/>	1109	Kevin Cooke	[Redacted]			Current		remove - make leader
	Emergency contact: Mrs Alison Cook							
<input type="checkbox"/>	1377	Adie Ditchburn				Current		remove - make leader
	Emergency contact: Sandy Ditchburn							
<input type="checkbox"/>	323	Alan Russell			Current	Leader	remove - cancel leader	
	Emergency contact: Sue							

Do with selected   Send E-mail   3 members (0 selected)

Add member by name

- select member -   Add

Add member by membership number

[Input field]


Separate numbers by commas



Help



# Emailing Group Members

- When Group Leader communicates with the members he/she should take account of GDPR rules. The Beacon email complies with GDPR
- The emailing format opens when the 'Do with Selected' button (along with send email) is selected on the members page.
- Sender can select host's email address they if more than one at the top of the email form which is followed by the users selected in the distribution of the email. Recommend select 'tick to receive copy'.
- Attachments added using 'choose files' button and subject field must be completed.
- Links can be inserted with link button – 
- Personalisation tokens are available through list in right hand column

# u3a Worcester Beacon

Home  
Send E-mail

From: Adrian Ditchburn <adrian.ditchburn@sky.com> | Adrian Ditchburn <training@worcesteru3a.org>

To: Alan Russell <computing@worcesteru3a.org> 1 addressee/s

Tick to receive copy

Load standard message [dropdown]

Add Attachments: Choose files

Subject: Beacon training

Rich text editor: Edit | Insert | Format | Table | Undo | Redo | Text | Bold | Italic | Bulleted list | Numbered list | Indent | Outdent | **Link** (circled in red) | Table | Table

Personalise this e-mail using tokens. Click one to insert.

Member		Member's Partner
#TITLE	Mr, Ms etc.	#P
#FORENAME	e.g. William	#P
#SURNAME		#P
#FAM	familiar name e.g. Will	#P
#MEMNO	membership number	#P
#EMAIL		#P
#TELEPHONE		#P
#TELEPHONE4	last 4 digits	#P
#MOBILE		#P
#MOBILE4	last 4 digits	#P
#EMERGENCY	emergency contact	#P
#AFFILIATION	home u3a	#P
#RENEW	renewal date.	#P
#LASTRENEW	last renewal date	#P
#FEE	renewal fee	#P
#LASTFEE	last renewal fee	#P





# Miscellaneous

- Two further options/pages available on the Group Record page
  - Ledger – if group holds money away from the Treasurer then a record of monies held can be recorded/updated in this page
  - Schedule – Dates of group events can be recorded in Beacon but generally defunct now groups are using siteworks u3a websites.
- Beacon will 'time out' on a page when no activity takes place after a period of time and will return the user to the Admin (Home) page to login again.

# u3a Worcester Beacon

[Home](#) - [Groups List](#)

## Group Record for Tech Surgery for Non-Techies

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

**Group Ledger**

From  to

Date	Payee	Detail	In	Out	Balance
		Brought forward			£0.00
Date	Payee	Detail	In	Out	Balance

**Add transaction**

Date	Payee	Detail	In	Out
11/08/2025				

[Home](#) - [Groups List](#)

[Help](#)

# u3a Worcester Beacon

[Home](#) - [Groups List](#) - [Calendar](#)

## Group Record for Tech Surgery for Non-Techies

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

Group Schedule					
<input type="checkbox"/> Show Detail					
Date & Time	Until	Venue	Topic	Enquiries	
Date & Time	Until	Venue	Topic	Enquiries	

### 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