

## Chapter 5 – LOGIN AS A COMMITTEE MEMBER

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*If you have downloaded this document, we suggest you check the Southwell U3A website from time to time to confirm that this is the latest version (the date of the last update is shown in the footer of each page).*

These are the menu selections available after logging into Beacon as a **Committee Member** but the precise information available will differ dependant on your additional roles e.g. as membership secretary or treasurer & if you have an additional non-committee role such as **Group Leader**.

Administration				
You are logged in as Graeme Bunting <a href="#">Log Out</a>				
Membership	Groups	Finance	Misc	Set up
<a href="#">Members</a>	<a href="#">Groups</a>		<a href="#">U3A officers</a>	
<a href="#">Addresses export</a>	<a href="#">Venues</a>		<a href="#">E-mail delivery</a>	
<a href="#">Statistics</a>	<a href="#">Calendar</a>		<a href="#">Personal preferences</a>	
<a href="#">U3A Beacon Users' Forum</a>		<a href="#">Beacon User's Guide</a>	<a href="#">Beacon Change Log</a>	

# MEMBERSHIP MENU

## A. Members

1. Click **Members** from the Home screen to display a full list of *Current* members.

**Members**

Quick Find  Search ☐ include criteria below

Status: ☒ Current ☐ Deceased ☐ Lapsed ☐ Resigned

Poll:  ☐ Negate poll Class:  Payment type:

Use Quick Find or select filters above to customise list of members.  
Perform operations on list 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	No	Name	Address	Telephone	Class	Status
▲▼		A				

- Other **Status** types can be displayed by ticking *Deceased*, *Lapsed*, etc.
  - The display can be refined by selecting a **Class** (e.g. *Associate*), a **Payment type** (e.g. *Cheque*) or a **Poll** (e.g. *Committee*). Ticking **Negate Poll** displays members not belonging to the selected Poll.
  - The **Quick Find** box may be used to search quickly for full or partial matches in the Member's Name, Known As, Street, Town, Post code and Telephone number fields.
2. To select one or more members prior to performing an operation such as sending an email, tick the boxes in the left hand column. Or click **Select** at the top or bottom of the column, followed by one of the following:-
    - *Select All*
    - *Clear All*
    - *Email only*
    - *Without email*.

<input type="checkbox"/>	366	Test User Zorro	99 Zorro Street, Carlton, Nottingham, NG4 1ZZ
Select	No	Name	Address

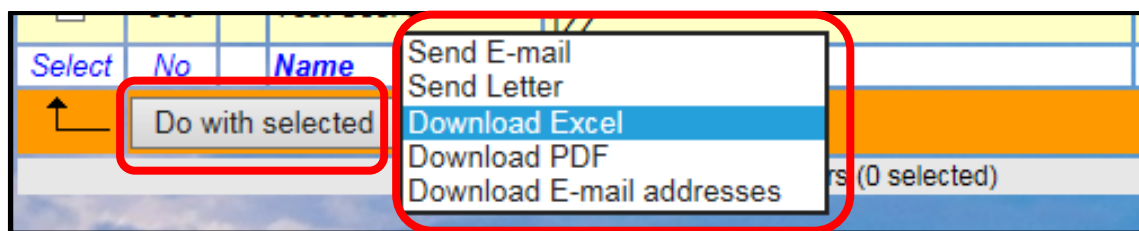
Select All  
Clear All  
E-mail only  
Without E-mail

Send E-mail

363 members (0 selected)

Select operation to be performed in the drop-down menu. Select the members on whom to perform the operation with the operation (click on Select column header for preset selection then press 'Do with selected'.

3. The following options are available by selecting from the drop-down list below the table and then pressing **Do with selected**.



- **Send Email** to send personalised emails to selected members or selected *Polls*, e.g. Committee - see Chapter 4
- **Send Letter** to create a file containing a 1 page personalised letter or document for each selected member - see Chapter 4.
- **Download Excel** to open a spreadsheet containing the Membership List; i.e. Name, Address, Phone number, Email address, Class & Status.
- **Download pdf** to open a pdf file containing Name, Address, Class & Status.
- **Download Email addresses** to open a spreadsheet containing Email address and Name.<sup>1</sup>
- Options for **Add to Group** and **Add to Poll** are available for Groups Coordinator and Membership Secretary user roles.

## B. Address Export

1. Click **Address Export** from the Home screen to generate a membership list with members who share the same address grouped together in the same record, e.g.
  - Mr & Mrs D.P. Gumby, or
  - Mr F. Gumby & Mrs A. Elke
2. Choose the type of export required, i.e.
  - **Excel** for an Excel file of addresses and members names
  - **Labels** for a pdf file of address labels
  - **Third Age Matters** for an Excel file of members that receive TAM (to send to [u3a@doingmore.co.uk](mailto:u3a@doingmore.co.uk) during the quarterly submission windows)

The list of members can be filtered by ticking boxes for **Status** and **Class**, as well as selecting from the drop-down lists for **Poll** and **Group**.

### Addresses Export



Format: ☐ Third Age Matters ☒ Labels ☐ Excel ☐ CSV ☐ TSV

Status: ☒ Current ☐ Deceased ☐ Lapsed ☐ Resigned

Classes: ☐ Associate ☐ Associate Joint ☒ Individual ☐ Joint

Poll: ☐ - any or none - ☐ Negate poll Group: ☐ - any or none -

3. Press the button below the list (**Download Labels**, or **Download TAM** or **Export Excel** depending on what was selected at step 2).

<input checked="" type="checkbox"/>		Mr A & Mrs M Mann	16 Any Street, Swansville, East Riding Of Yorks, HU45 4HH	Associate	Current
<input checked="" type="checkbox"/>		Mr P Martinez	11 Pauls Avenue, Gedling, Nottingham, NG4 1PM	Associate	Current
<input checked="" type="checkbox"/>		Sir T Member	123 Long, Dronfield, Derbyshire, S18 3DT	Associate	Current
<div> <div>▲▼</div> <div>S</div> </div>					
<input checked="" type="checkbox"/>		Mrs G Smith	Apple Cottage Farm Lane, Lambridge, Borchester, BO20 3FC	Associate	Current
Select		Name	Address	Class	Status
<div> <div>↑</div> <div>Download Labels</div> </div>					
8 members (8 selected)					

4. If downloading labels, the next screen gives the option of changing the label size and the layout of the sheets, before clicking **Download Labels**.

### Address Labels

All dimensions in millimetres

Labels per sheet

21

Labels per row

3

Label width

100.0

Label height

50.1

Left offset

5

Top offset

15

Save as Defaults

8 labels to be printed

Print from sheet position 1

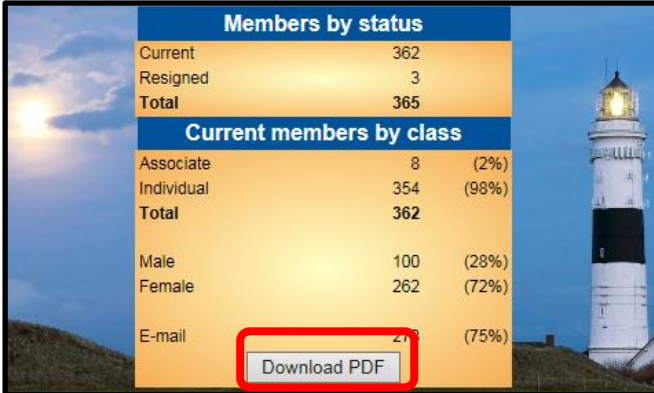
Download Labels

5. Click **Open** to view the pdf or Excel file.

M Barrell-two 100 Old Street SWANSVILLE SX11 5ZZ	Dr H Crippen 57 Azalea Drive SWANSVILLE BR7 9ZZ	Cano A Fortescue-Smythe The Vicarage Lord Street Additional Line 1 Additional Line 2 LORDSTOWN XE20 1YZ
Lady C Groan The Room Of Roots Castle Street GORMENGHAST CT1 9TT	Mr A & Mrs M Mann 16 Any Street SWANSVILLE HU45 4HH	Mr P Martinez 11 Pauls Avenue Gedling NOTTINGHAM NG4 1PM

## C. Statistics

1. To generate a list of membership statistics, click **Statistics** from the Home screen.
2. The statistics are displayed on screen. Click **Download pdf**.



The screenshot shows two tables overlaid on a background image of a lighthouse. The first table, 'Members by status', has three rows: Current (362), Resigned (3), and Total (365). The second table, 'Current members by class', has six rows: Associate (8, 2%), Individual (354, 98%), Total (362), Male (100, 28%), Female (262, 72%), and E-mail (273, 75%). A red rectangle highlights the 'Download PDF' button at the bottom of the second table.

Members by status		
Current	362	
Resigned	3	
<b>Total</b>	<b>365</b>	

Current members by class		
Associate	8	(2%)
Individual	354	(98%)
<b>Total</b>	<b>362</b>	
Male	100	(28%)
Female	262	(72%)
E-mail	273	(75%)

Download PDF

3. Click **Open** to view the pdf file.

Members by status		
Current	362	
Resigned	3	
<b>Total</b>	<b>365</b>	

Current members by class		
Associate	8	2%
Individual	354	98%
<b>Total</b>	<b>362</b>	
Male	100	28%
Female	262	72%
Email	273	75%

## GROUPS MENU

### D. Groups

1. To see a list of *active* Groups, click **Groups**, from the Home Page.

*To see Inactive Groups as well, untick the *Show Active Groups Only* box.*



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
▲ ▼	<b>A</b>							
<input type="checkbox"/>	Aerobics	Y				1		
<input type="checkbox"/>	Animal Husbandry	Y	1st Tuesday in the month	The Smallholding	Ziggy Zand	3	10	
<input type="checkbox"/>	Architecture	Y	2nd Tuesday 2pm	Pagan Hill Park	Wil Alsop	12	23	
<input type="checkbox"/>	Architecture 2	Y	3rd Wednesday	Health Club	Al Abrahams	5	20	
<input type="checkbox"/>					Gordon Banks			
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday of the month	The Feelgood Centre		5	10	
<input type="checkbox"/>					Angela Velu			
▲ ▼	<b>B</b>							
<input type="checkbox"/>	Basketball	Y	22nd September 2016	Leisure Centre	Sammy Anderson	1	4	
<input type="checkbox"/>	Bee Keeping	Y	Wednesday 12th August	College		7	12	
<input type="checkbox"/>					Bill Allen			

The table can be sorted in a different order by clicking the blue column headings (*Group*, *Where* & *Leaders*).

- To locate a Group either scroll down the list until it is found, or click one the blue letters in the row above the table, e.g. "W" to jump to Groups starting with W.
- To filter the list to specific types of Group, select a **Faculty** from the drop-down list, e.g. Outdoor Activities.

Faculty Outdoor Activities ☒ 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
▲ ▼	<b>B</b>							
<input type="checkbox"/>	Bird Watching Thursday	Y	3rd Thursday	No Fixed Venue			12	
▲ ▼	<b>K</b>							
<input type="checkbox"/>	Keep Fit	Y	1st & 3rd Wed.	The Feelgood Centre			15	
▲ ▼	<b>T</b>							
<input type="checkbox"/>	Thames Path & Other Walks	Y	2nd and 4th Friday 10.15am	No Fixed Venue	Tricia Abrahams	1		

Do with selected Send Email to leaders

3 groups; 1 leaders (0 selected)

- To select one or more Groups prior to performing an operation such as sending an email, tick the boxes in the left hand column. Or click **Select** at the top or bottom of the column, followed by one of the following:-
  - Select All
  - Clear All
  - Email only
  - Without email.

<input type="checkbox"/>	Wine Lovers	Y	1st Tuesday	The Old Court House
Select	Group	Active	When	Where

Select All  
 Clear All  
 E-mail only  
 Without E-mail

Send E-mail to leaders ▼

80 groups; 83 leaders (0 selected)

Select operation to be performed in the drop-down menu  
 select the groups/leaders on whom to perform the operation with  
 (click on Select column header for preset selection)  
 then press 'Do with selected'.

- To email Group Leaders, Select **Send email to leaders** followed by **Do with Selected**.

<input type="checkbox"/>	Ticket to Ride	Y	As arranged	
▲ ▼	U			
<input type="checkbox"/>	Ukulele	Y	1st Thursday and 3rd Tuesday	Full Moon Inn
▲ ▼	W			
<input type="checkbox"/>	Wine Lovers	Y	1st Tuesday	The Old Court House
Select	Group	Active	When	Where

Do with selected    Send E-mail to leaders ▼

80 groups; 83 leaders (0 selected)

- To download an Excel file of the Groups List, select **Download Groups** followed by **Do with Selected**.

▲ ▼	W			
<input type="checkbox"/>	Wine Lovers	Y	1st Tuesday	The Old Court House
Select	Group	Active	When	Where

Do with selected    Download groups ▼

80 groups; 83 leaders (0 selected)

This opens a spreadsheet containing the Group name, Leader, Meet time/day, Venue and Details.

## E. Venues

- To view details about venues on the system click **Venues** on the Home Page.

Group Venues			
Name	Contact	Telephone	Accessible
A member's Home	Group leader		
Burgage Close Community Centre			
Full Moon Inn			
Gossips Coffee House			
Group leaders home	Group leader for details		
Nottingham Climbing Centre			
Our Lady of Victories Catholic Parish Centre			
Southwell Baptist Church			
Southwell Leisure Centre			
Southwell Library			
Southwell Town Bowls Club			
The Old Court House			
Thurgarton Methodist Church			
Thurgarton Village Hall			
Trebeck Hall			

- Click a blue link to see the **Venue Record**. Few details are currently available. If Group Leaders are able to provide details of the venues in respect of their particular groups to Alison Clark they can be added to the system.

Group Venue	
Venue	<input type="text" value="Southwell Leisure Centre"/>
Address	<input type="text" value="Nottingham Road Southwell"/>
Postcode	<input type="text" value="NG25 0LG"/> <input type="button" value="Map"/> <input type="checkbox"/> Private address <input type="checkbox"/> Accessible
Telephone	<input type="text"/>
E-mail	<input type="text"/> <input type="button" value="Send"/>
Website	<input type="text"/> <input data-bbox="874 1234 911 1256" type="button" value="..."/>
Contact	<input type="text"/>
Notes	<div></div>

- Press the **Map** button to view a map of the venue.
  - Press the **Send** button to send an email to the venue.
  - Press the .... Button to open the website of the venue.
- After editing any of the fields press **Save Record**.
  - To add a new Venue, refer to Chapter 6.

## F. Calendar

- To view the Calendar, click **Calendar** on the Home Page.



**Calendar**

Show: ☒ all ☐ for member ▼ ☐ venue A member's Home ▼

From 08/01/2018 To 08/04/2018

☐ Show Detail

Date & Time	Until	Group	Venue	Topic	Enquiries
Mon 8 Jan 2018 10:00	12:00	Badminton	Southwell Leisure Centre - <a href="#">map</a>		
Mon 8 Jan 2018 10:00	12:30	Indoor Climbing	Nottingham Climbing Centre - <a href="#">map</a>		damoore1@btinternet.com
Mon 8 Jan 2018 10:00	12:00	Ancient Greek	Southwell Library - <a href="#">map</a>		
Mon 8 Jan 2018 14:00	16:00	Bridge	Burgage Close Community Centre - <a href="#">map</a>		
Tue 9 Jan 2018 10:00	12:00	Geology Landscape of the UK			
Tue 9 Jan 2018 10:15	12:00	Philosophy	Burgage Close Community Centre - <a href="#">map</a>		
Tue 9 Jan 2018 14:00	16:00	Local History	Southwell Baptist Church - <a href="#">map</a>	History of the Nottinghamshire motor industry	
Tue 9 Jan 2018 14:00	16:00	Photography	Southwell Library - <a href="#">map</a>		
Tue 9 Jan 2018 14:30	16:00	Poetry			
Wed 10 Jan 2018 10:00	12:00	Practical Gardening 2			
Wed 10 Jan 2018 12:00	14:00	Luncheon Club			
Wed 10 Jan 2018 14:00	16:00	Sugarcraft			
Wed 10 Jan 2018 14:30	15:30	Gentle Exercise 1	Our Lady of Victories Catholic		

2. To customise the display:

- Change to *From* and *To* dates.
- Select a specific *venue* from the drop-down list.
- Tick **Show Detail** to display additional information about each Event.
- Click **map** to open a map of a venue.

3. Press the **Download pdf** button below the table to download a pdf copy of the Calendar using whichever web browser or app you prefer.

Automatic Zoom

**Southwell U3A**

**Calendar 08/01/2018 to 08/04/2018**

Date & Time	Until	Group	Venue	Topic	Enquiries
Mon 8 Jan 2018 10:00	12:00	Badminton	Southwell Leisure Centre		
Mon 8 Jan 2018 10:00	12:30	Indoor Climbing	Nottingham Climbing Centre		damoore1@btinternet.com
Mon 8 Jan 2018 10:00	12:00	Ancient Greek	Southwell Library		
Mon 8 Jan 2018 14:00	16:00	Bridge	Burgage Close Community Centre		
Tue 9 Jan 2018 10:00	12:00	Geology Landscape of the UK			
Tue 9 Jan 2018 10:15	12:00	Philosophy	Burgage Close Community Centre		
Tue 9 Jan 2018 14:00	16:00	Local History	Southwell Baptist Church	History of the Nottinghamshire motor industry	
Tue 9 Jan 2018 14:00	16:00	Photography	Southwell Library		
Tue 9 Jan 2018 14:30	16:00	Poetry			
Wed 10 Jan 2018 10:00	12:00	Practical Gardening 2			
Wed 10 Jan 2018 12:00	14:00	Luncheon Club			
Wed 10 Jan 2018 14:00	16:00	Sugarcraft			
Wed 10 Jan 2018 14:30	15:30	Gentle Exercise 1	Our Lady of Victories Catholic Parish Centre		
Wed 10 Jan 2018 14:30	16:00	Recorder			
Thu 11 Jan 2018 10:00	12:00	Architecture-Built Environment	Southwell Library		
Thu 11 Jan 2018 14:30	15:30	Italian Beginners			

## MISC MENU

### G. U3A Officers & Post Holders

Click U3A Officers to view a list of Committee Members and other post holders, along with their email addresses.

- To send an email to some people on the list, tick those required, followed by **Send Email**.
- To send an email to everyone on the list click **Select**, followed by **Send Email**.

### H. Email Delivery

Refer to Chapter 4 for details of how to track the progress of emails that you have sent.

### I. Personal preferences

Refer to Chapter 3 for details of how to update your personal preferences.

## REVISION LOG

Rev.	Date	Section	Changes