

Chapter 6 – LOGIN AS A GROUP Leader

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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).

The menu selections available after logging into Beacon as a **Group Leader** will appear on the opening Home page in blue. Other menu picks will be visible if you have an additional role such as **Committee Member**.

GROUPS MENU

A. Groups

1. Click **Groups** from the Home Page to see a list of active Groups. To see *Inactive Groups* as well, untick the [Show Active Groups Only](#) box. The table can be sorted in a different order by clicking the blue column headings ([Group](#), [Where](#) & [Leaders](#)).

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"/>	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							
<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			

2. 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.
3. To filter the list to specific types of Group, select a [Faculty](#) from the drop-down list, e.g. [Walking & Outdoor](#).

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

Select Group Active When Where Leaders Members Max Waiting

Do with selected Send E-mail to leaders

3 groups; 1 leaders (0 selected)

4. Groups for which you are a Leader are highlighted in blue.
5. Click on a blue link to see the **Group Record**, which consists of 4 pages - [Details](#), [Schedule](#), [Members](#) & [Ledger](#)

A1 Group Details

The **Details** page shows information about where and when the Group meets. Hover the cursor over the fields to display details about what to show (also refer to the table below).

Group Record for Photography

Details Schedule Members Ledger

Group Details

Group: Photography

Faculty: Arts Status: Active Max members:

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

When: 2nd Tuesday

Normal start time: 14:00 End time: 16:00 Contact:

Venue: Southwell Library

Information: This group has 3 main aims: to help people understand their cameras, to learn how to take better photos, how to store and share them and to learn how to edit and print photos

Notes:

Group record created 7 Aug 2017 12:38; last changed 7 Aug 2017 12:38

Save Record Delete

1. After editing any of the fields press **Save Record**.



Do not press the **Delete** button!

2. If you make any significant changes to the Group details, please notify Alison Clark AND the Webmaster at southwellu3a@gmail.com so that the Southwell U3A website can be updated accordingly.

Max members	Leave blank – we do not impose limits on Group size
When *	This appears in the Meets field of the Groups List in both the Public Groups webpage and in due course in the Members Portal Groups webpage. <ul style="list-style-type: none">• Enter the usual meeting day and time, if applicable. (e.g. “3rd Tuesday at 10:00am”).• If no regular day/time, enter something descriptive like: “Once a month at a local pub”
Start time / End time	If no regular times, leave blank
Contact	Forename and phone number of the Leader (e.g. John on 0115 123 4567)
Venue	This appears in the Venue field of the Groups List in both the Public Groups webpage and the in the Members Portal Groups webpage. <ul style="list-style-type: none">• Choose the usual venue (e.g. Library) or usual meeting place for trips/walks (e.g. Meet at Leisure Centre carpark) from the drop-down list.• Leave blank if no regular venue/meeting location.
Information *	Detailed information about the Group. If meetings are held in a member’s house, only limited details should be shown in the Information field. Typical entries could be “John’s house” or “xx Church Street, Southwell”.
Notes	This is for private notes that will not be displayed in the website Calendar or Groups List.

* Note: certain characters don’t display in the [When](#) and [Information](#) fields, i.e. “ \$ % < > |

A2 Group Schedule

The number of events to be added can be specified as a specific number or not beyond a specific date.

There is the option of ticking the *Exclude from public calendar* box, although it is unlikely that this would be used.

4. After all the details have been entered, press **Add Events**.

Notes

- *The only special characters that can be displayed in the *Topic* field are: ! & - ?*
- *It is recommended to not create too many events in advance in case you end up having to delete or change them all.*
- *See the comments in Section [A1] above about how the fields should be filled in and what can be seen in the Public Calendar and Public Groups List.*
- *Some Groups meet at one location and travel to another location, e.g. the walking groups, Bird Watching, Photography, Trips, etc. These Groups should enter the “Meet at ...” location in the *Venue* field and the destination or walk location in the *Topic* field. This may require an additional “Meet at ...” Venue adding (see section [B1]).*

A3 Group Ledger

Click **Ledger** to display the financial ledger for the Group.

Group Record for Wine Lovers 2

Details Schedule Members **Ledger**

Group Ledger

From 1/6/2015 to 31/5/2016

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00

Add transaction

Date	Payee	Detail	In	Out
02/02/2016				

Save

The Ledger can be used to record a Group's financial transactions and keep a running total of the balance. It is separate to the main Treasurer's Ledger.

To add a new transaction, fill in the date, payee, detail, plus the amount paid in or out and press **Save**.

The detail field can be used for additional information e.g. that the payment in is the ticket price paid for a particular concert or a specified non-member guest or both.

A4 Group Members

1. Click **Members** to view a list of Group members.

Details Schedule **Members** Ledger

Group Members

Select	Name	Address	Telephone	Mobile	Status	
<input type="checkbox"/>	Bully Longhorn	The Paddock Green Street, Hillside, SP9 9PS	665544	07998877665	Current	remove - make leader
<input type="checkbox"/>	Emergency contact: 01425 665544					
<input type="checkbox"/>	Ellie Phant	23 Regents Park, London, E1 7NT			Current	remove - make leader
<input type="checkbox"/>	Ziggy Zand	Ziggy, Downtown, PP6 6PP			Current	Leader remove - cancel leader

Select Name Address Telephone Mobile Status

Do with selected Send E-mail

3 members (0 selected)

Add member by name

- select member - Add

Add member by membership number

Separate numbers by commas

Add

Home - Groups List

- **Note:** members that have not yet renewed their membership for the current year show up in red text. **BUT will only be removed from membership of Southwell U3A (& group membership lists) when their membership is cancelled.**
- Members without email are denoted by an icon of a letter with a red diagonal line through it.

2. Click the blue links on the right to:
 - Remove a member
 - Make a member a Group Leader
 - Remove a member from the Leader role.
3. Members can be added to the Group; either individually by selecting their name from the drop-down list below the table, or in batches by entering their membership numbers (if known) separated by commas and pressing **Add**.

4. When adding members by number, you will be prompted to confirm that the correct members have been selected.

Select	No	Name	
<input checked="" type="checkbox"/>	5	Basia Arch	
<input checked="" type="checkbox"/>	22	Patricia Bearder	
<input checked="" type="checkbox"/>	45	Kenneth Brown	
<input checked="" type="checkbox"/>	103	Pamela Ede-Cooper	
	254	Kath Robins	Already a member of this group
Select	No	Name	
Add selected members			

Group Members Actions

The following actions can be done for all or selected Group members:-

- Send them an email - see Chapter 4
 - Download address and contact details (and photo if available) in pdf format
 - Download address and contact details in Excel ^[12]
1. Either tick the required members in the *Select* column, or to perform an operation with all members, click **Select** at the bottom of the *Select* column, followed by **Select all**.

2. Choose the required action from the drop-down list

Select	Name	Address
↑	Do with selected	Send E-mail Download Excel Download PDF

- For Excel and pdf downloads tick the required fields in the next form, followed by **Download**.

Select the fields to be included

in addition to a member's name

☒ E-mail
☒ Telephone
☒ Mobile
☒ Address
☒ Emergency contact
☒ Photo

Download

- Click either **Open** to view the file, or **Save** followed by **Save as** to save the file.

B. Venues

- Click **Venues** on the Home Page to view a list of venues.

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			

2. Click a blue link to see the **Venue Record**.

The screenshot shows a web form titled "Group Venue". It contains the following fields and controls:

- Venue:** Text input with "Southwell Leisure Centre".
- Address:** Text input with "Nottingham Road Southwell".
- Postcode:** Text input with "NG25 0LG" and a "Map" button.
- Private address:** ☐ checkbox.
- Accessible:** ☐ checkbox.
- Telephone:** Text input.
- E-mail:** Text input with a "Send" button.
- Website:** Text input with a "... " button.
- Contact:** Text input.
- Notes:** Large text area.

- 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.

3. After editing any of the fields press **Save Record**.

This screenshot shows the same "Group Venue" form, but with different data and a red circle around the "Save Record" button at the bottom. The data entered is:

- Venue:** Andy's Bike Shed
- Address:** Railway Crossing
- Postcode:** HS23 6TH
- Telephone:** 07777 999 666
- E-mail:** neverneverland@farfaraway.com
- Website:** http://u3asites.org.uk/chardilminster/home
- Contact:** Andy Spoke
- Notes:** Dolor fermentum justo urna, platea odio eget at erat at vehicula, arcu augue eget eros ut vestibulum at, odio maecenas pellentesque, dignissim purus. Eleifend mus sagittis nulla vulputate semper, suscipit ipsum, at ullamcorper etiam donec, vel proin donec elementum tortor odio alias. Tellus aptent vestibulum vivamus nec, eum tempus praesent. Ridiculus amet cum

The "Save Record" button is circled in red, and a "Delete" button is visible next to it.

B1 Add New Venue

1. Click **Add New Venue** from the [Venues List](#) or a [Venue record](#).

Group Venue

new venue

Venue

Address

Postcode ☐ Private address ☐ Accessible

Telephone

E-mail

Website

Contact

Notes

- All fields are optional except the *Venue* name.
- *Private address* should be ticked if it is a private residence or somewhere else for which the details should not be displayed publicly.
- *Accessible* may be ticked to indicate that the venue is fully accessible.
- If the venue is somewhere that a Group will meet prior to going on a trip or walk, start the venue with “Meet at”

Meet at Beastmarket Hill	
Meet at Ranmoor Road car park	
Meet at Richard Herrod	
Meet At The Starting Gate	
MFA Bowl	
Morrisons	

2. After inputting all the venue data press the **Save Record** button.

C. Calendar

1. Click **Calendar** on the Home Page to view the Calendar for the next 3 months.

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 - map		
Mon 8 Jan 2018 10:00	12:30	Indoor Climbing	Nottingham Climbing Centre - map		damoore1@btinternet.com
Mon 8 Jan 2018 10:00	12:00	Ancient Greek	Southwell Library - map		
Mon 8 Jan 2018 14:00	16:00	Bridge	Burgage Close Community Centre - map		
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 - map		
Tue 9 Jan 2018 14:00	16:00	Local History	Southwell Baptist Church - map	History of the Nottinghamshire motor industry	
Tue 9 Jan 2018 14:00	16:00	Photography	Southwell Library - map		
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		

Clicking the green **map** word alongside the venue name will open a map of a venue.

- To customise and download the display:
 - Change the *From* and *To* dates.
 - Select a specific venue from the drop-down list, if required.
 - Tick *Show Detail* to display additional information about each Event.
- Press **Download pdf** 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

D. 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**.

E. Email Delivery

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

F. Personal preferences

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

REVISION LOG

Rev.	Date	Section	Changes