Chapter 6 – LOGIN AS A GROUP Leader

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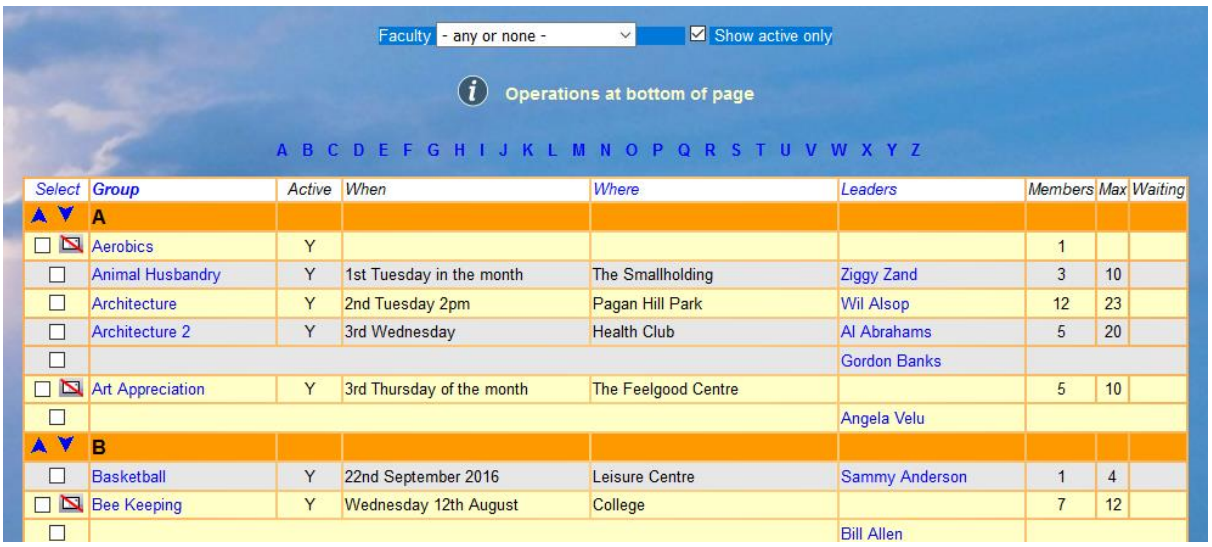
If you have downloaded this document, we suggest you check the Southwell U3A website from time to time to confirm that this is the latest version (the date of the last update is shown in the footer of each page).

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).*



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*.

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).

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

Do not press the **Delete** button!

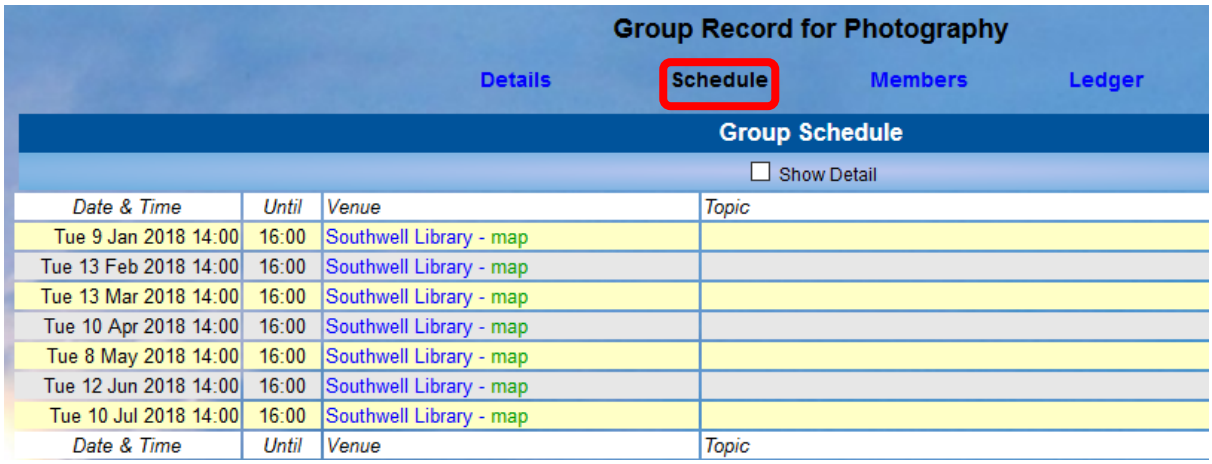
2. If you make any significant changes to the Group details, please notify Alison Clark AND the Webmaster at southwellu3a@gmail.com so that the Southwell U3A website can be updated accordingly.

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. • 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. • 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. " $ % < > *

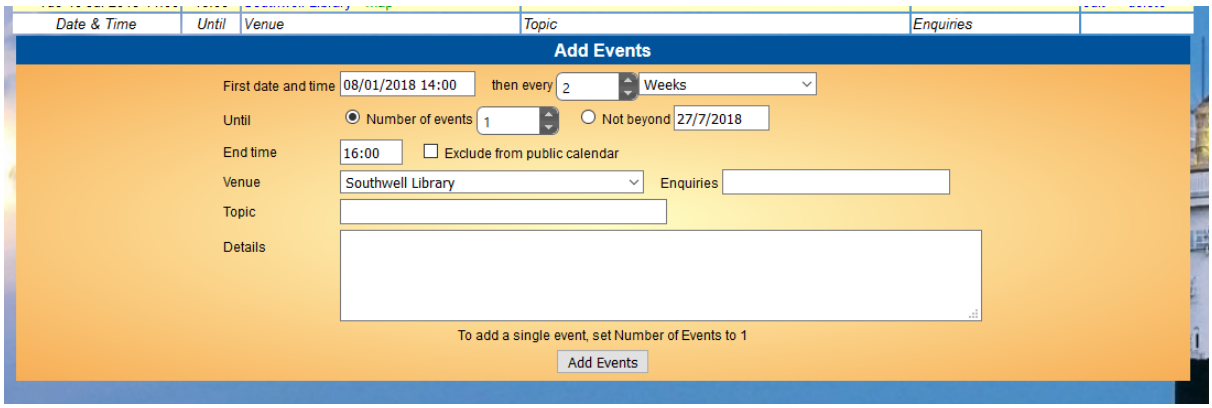
A2 Group Schedule

Click **Schedule** to view a list of forthcoming meetings.



Tick **Show Detail** to display if there is any additional information about the meetings. As the Group Leader you can add topic details using the *edited* or *deleted* blue links on the right.

More meetings can be added in the **Add Events** section at the bottom of the page, as follows



1. Amend any of the pre-filled in fields if required.

2. Click on *First date and time* and enter the date/time of the first new meeting.

3. For recurring meetings, add a number in the *then every* field and select a frequency from the drop-down list. In the example below the system has recognised the significance of the first date and has presented the additional option of *2nd Monday of the month*.

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.

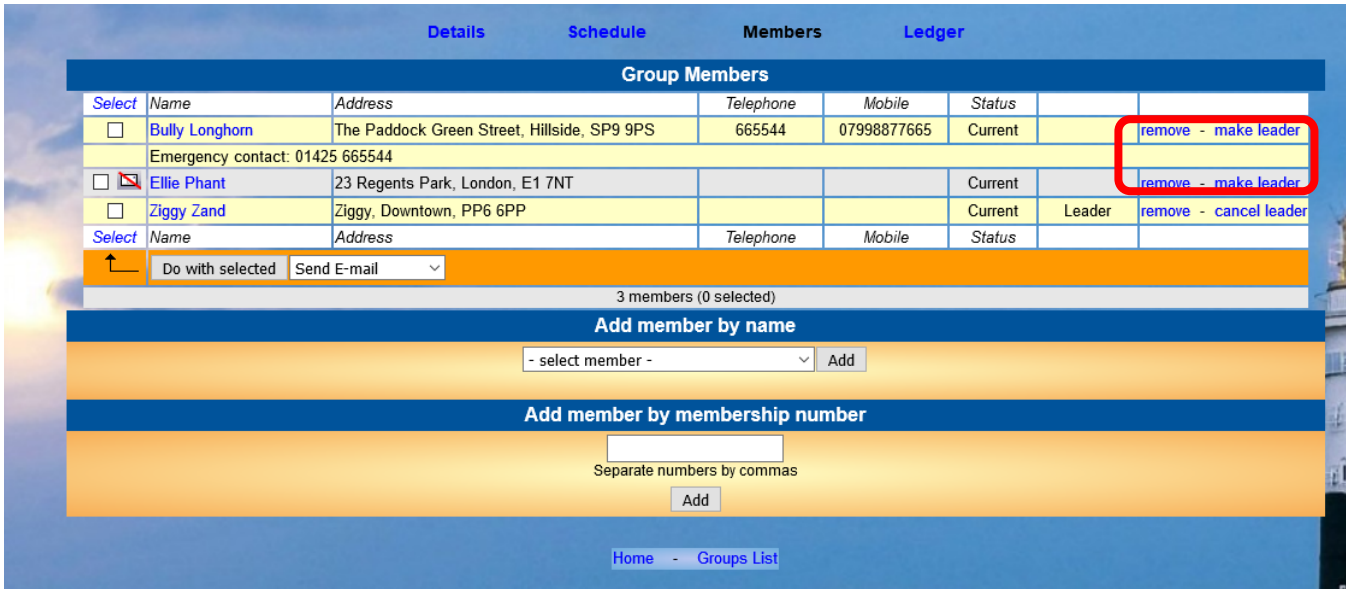
The Ledger can be used to record a Group's financial transactions and keep a running total of the balance. It is separate to the main Treasurer's Ledger.

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

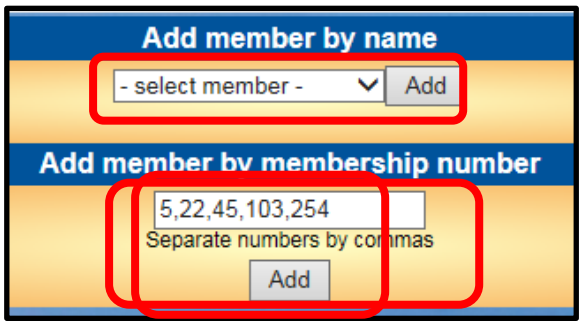
1. Click **Members** to view a list of Group members.



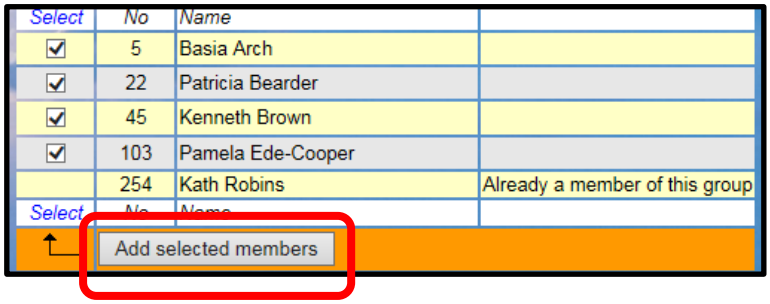
- ***Note:*** *members that have not yet renewed their membership for the current year show up in red text. BUT will only be removed from membership of Southwell U3A (& group membership lists) when their membership is cancelled.*
- *Members without email are denoted by an icon of a letter with a red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

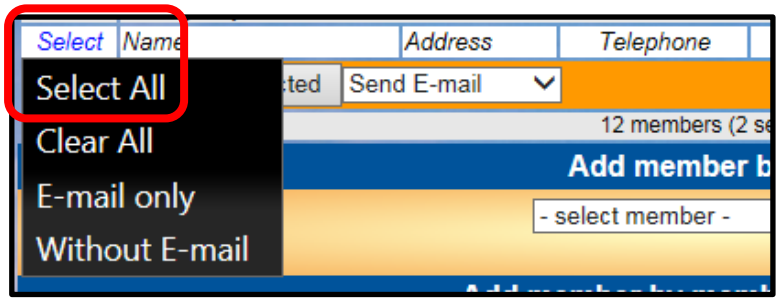


Group Members Actions

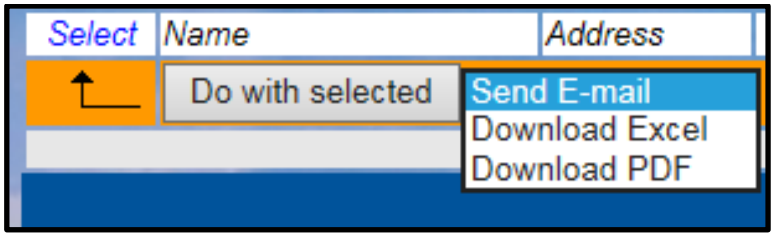
The following actions can be done for all or selected Group members:-

- 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

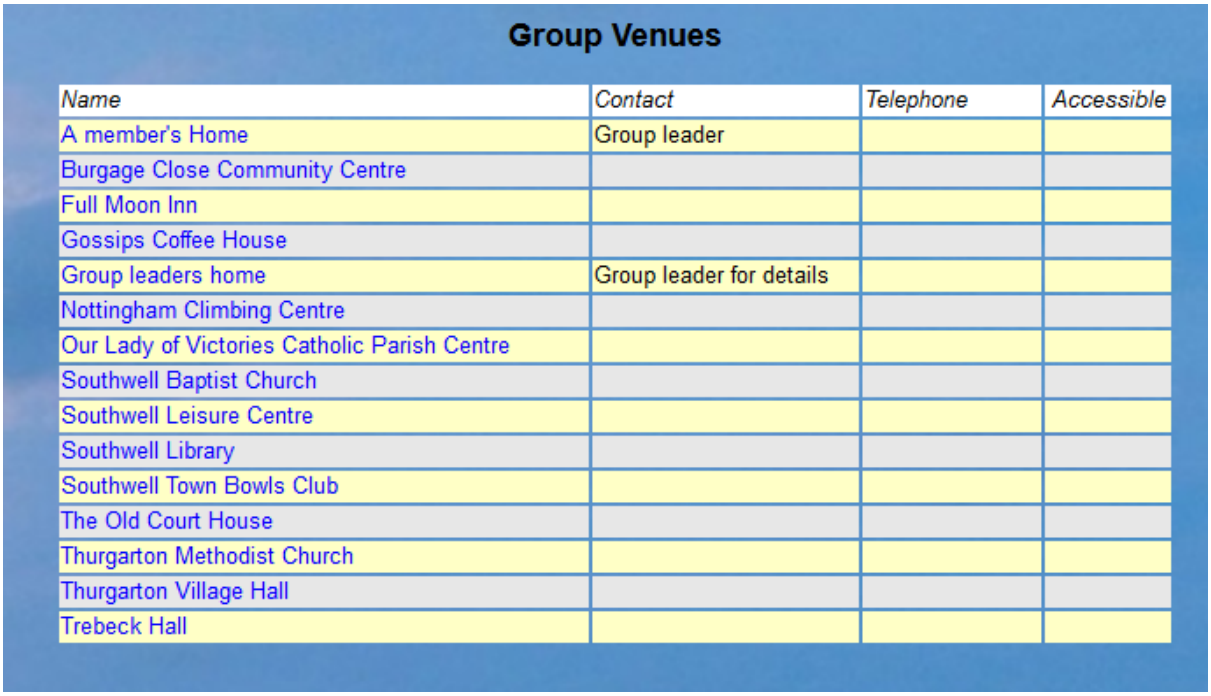


3. For Excel and pdf downloads tick the required fields in the next form, followed by **Download**.

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

B. Venues

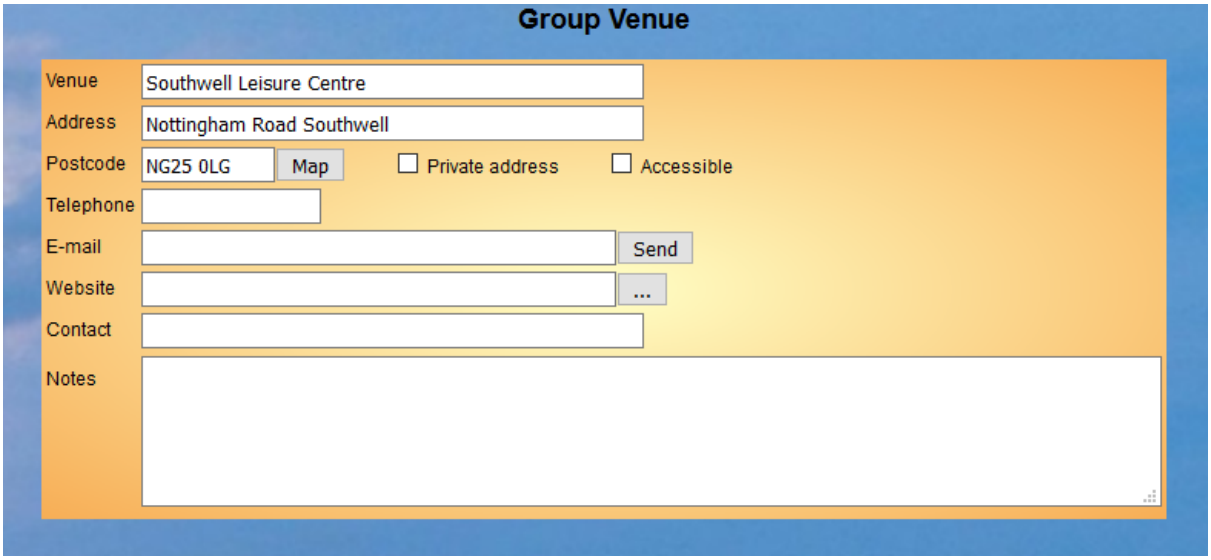
1. Click V**enues** on the Home Page to view a list of venues.



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**.

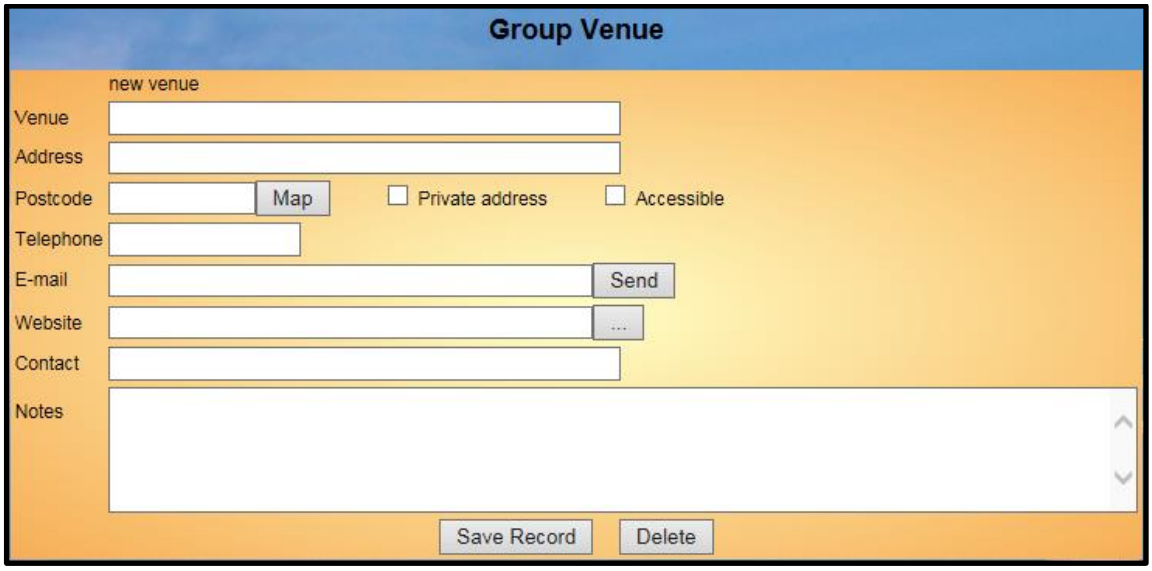


- Press the **Map** button to view a map of the venue.
- Press the **Send** button to send an email to the venue.
- Press the **….** Button to open the website of the venue.

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

B1 Add New Venue

1. Click **Add New Venue** from the *Venues List* or a *Venue record.*

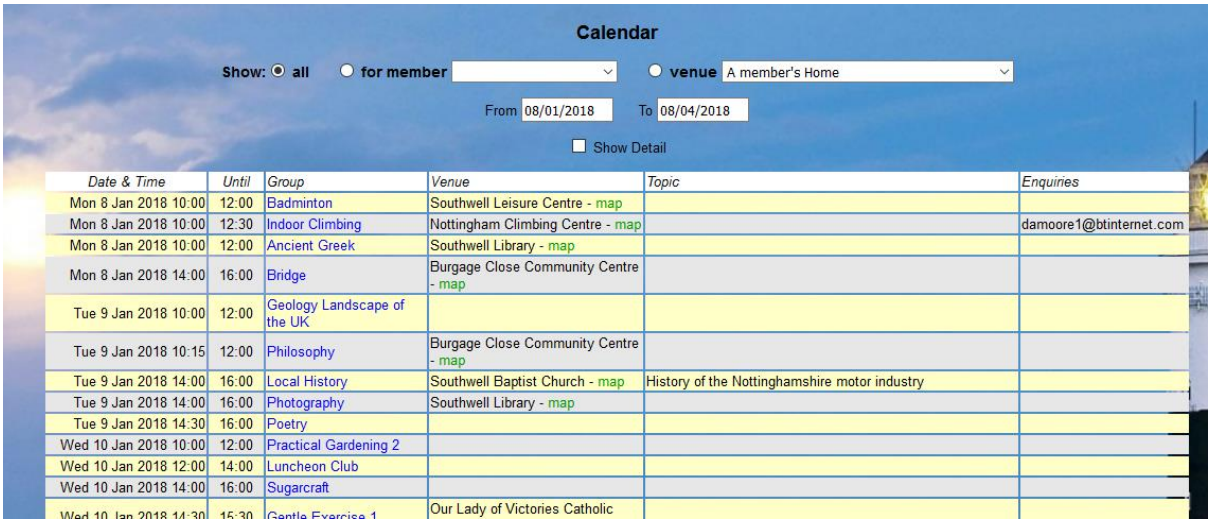


- All fields are optional except the *Venue* name.
- *Private address* should be ticked if it is a private residence or somewhere else for which the details should not be displayed publicly.
- *Accessible* may be ticked to indicate that the venue is fully accessible.
- If the venue is somewhere that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

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

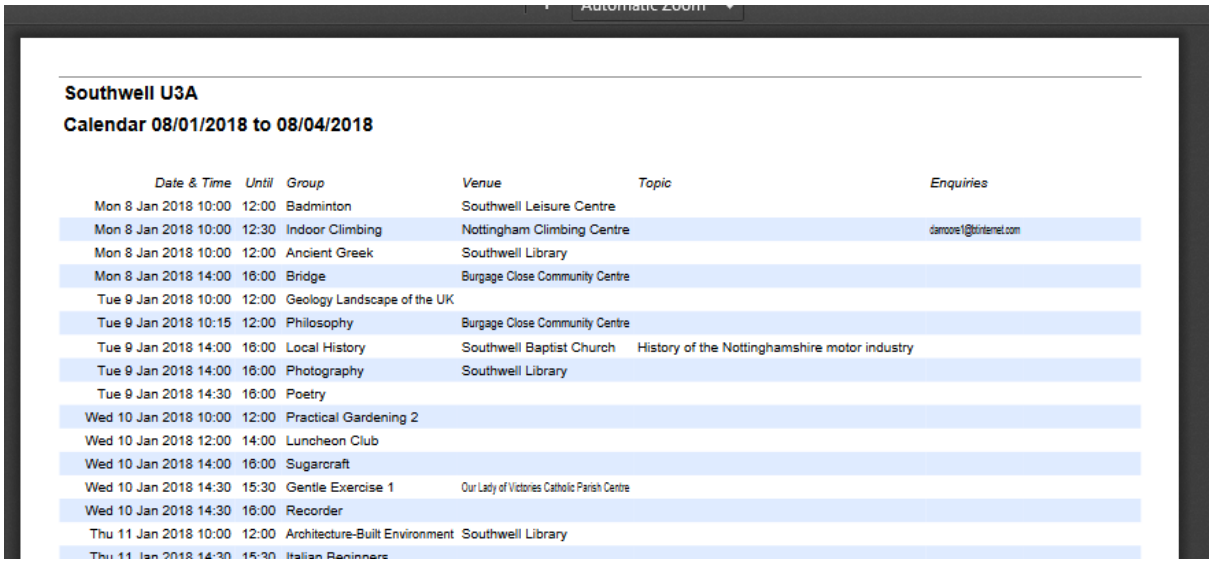
From 08/01/2018 To 08/04/2018

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.

2. 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.
3. Press **Download pdf** to download a pdf copy of the Calendar using whichever web browser or app you prefer.



Southwell U3A

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

Date & Time	Until	Group	Venue	Topic	Enquiries
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Mon 8 Jan 2018 10:00	12:30	Indoor Climbing	Nottingham Climbing Centre		damoore1@btinternet.com
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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		

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.

1. .

REVISION LOG

Rev.	Date	Section	Changes