



Beacon System Help Notes – for Group Coordinators

June 2025 Rev. 09

Subjects Covered:



- 1. Why Use Beacon?
- 2. How to Sign In
- 3. Select Your Group
- 4. Schedule
- 5. Joint a Group / Group Membership
- 6. Emailing your Group Members
- 7. Standard Messages
- 8. Ongoing Support

1. Why Use Beacon?



- We need some form of Membership Database system.
- Beacon system developed specifically for u3as. Over 600 u3as are using it. You can use it to varying degrees.
- More information on benefits:
- https://beacon.u3a.org.uk/wpcontent/uploads/2024/09/Beacon-.so-you-want-to-knowmore.pdf

1. Why Use Beacon?



- The main benefactors for the use of this data System is for our Membership Secretary and Groups Coordinator. However:
- Can be used by Group Coordinators
- Can be used for / by Treasurers
- Can be used by Members. But:
 - ➤ How useful it is to Members is (partly) dependent on how much data Coordinators put into the system
 - ➤ Members can access Beacon to: update their personal details; join groups; see the schedule of events for their groups.

1. Why Use Beacon?



Benefits for Groups Coordinator:

- Manage your group membership (check they are a iu3a member)
- Manage waiting list
- Bulk communication to your group (on a GDPR compliant basis)
- Assists the Membership Secretary and the Groups Support Coordinator

1. How to sign in to Beacon



There are various ways to log in.

You can get it through our iu3a website.

If you look at any of our main web pages, at the tabs along the top, you can see one called 'Members'.

Click on that one:



1. How to sign in to Beacon – Home page



This page will open:

home groups what's on join us contacts members







FOR MEMBERS

Members' Handbook

You can find a digital version of the latest Members Handbook \boldsymbol{here}

Gift Membership

Remember that you can 'gift' membership to a friend. See the details on our Join Us webpage.

iU3A (Beacon) Members' Login

You can use the Members' Portal to:

1. How to sign in to Beacon – Home page



Scroll down that page to:

Security of the System

For your peace of mind, there are four levels of access to Beacon, each with controlled security access requirements. Each level is described in more detail here:

1. **Qublic Links**

Limited information about our Interest Groups and a basic Meetings calendar, viewable by anyone (not just iU3A members).

2. iU3A Members' Login

You can see a tytorial for Members using Beacon by clicking **here**. This provides further guidance on how you can update any of your personal details. If you are a current member of iU3A, you can click **here** to log in to the Members' Portal.

3. Group Coordinators Login

Each Coordinator will be able to access their relevant group's details to publish for example information such as venue, timings and subjects. Coordinators can also use the system to send emails to their current group members as blind copy (protecting personal email addresses) and to check or add members to their group. Only paid-up iU3A members will appear on Beacon. The Beacon login for Group Coordinators is found **here**.

4. System Administrators' Login

Editing access for the Administrators to all data fields.

Group Coordinators / Leaders

The Beacon login for Group Coordinators is found here.

There is support for the Group Coordinators in their use of Beacon. A tutorial has been prepared and

2. How to sign in Home Page



2. Or you can find it on the internet directly. Its address is: https://www.u3abeacon.org.uk/password.php

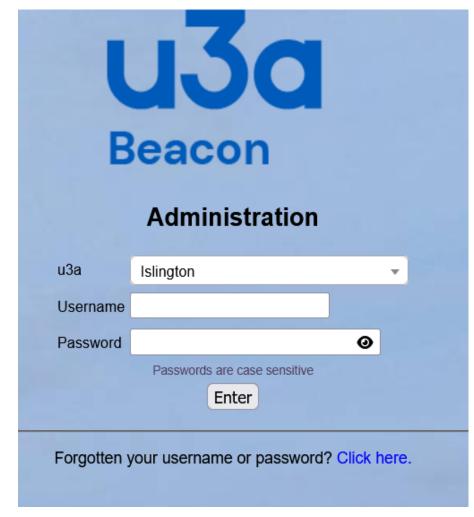
Type this into your browser (or copy & paste) and it will open the following internet page

You can then save it (as a 'Favourite' or a 'Bookmark'):

2. Sign in as a Coordinator



- Select Islington from drop down menu. Will probably remember this for you next time
- 2. Username: type in user name issued to you
- 3. Password: type in the one issued to you.
- 4. Hit the enter button







This is the HOME page. There are three main u3a Islington modules. You are only interested in the Groups Beacon module Administration You are logged in as Derek Harwood Log Out Membership Groups **Finance** Misc Set up Groups Ledger (by account) E-mail delivery Finance accounts Venues Personal preferences Ledger (by category) Finance categories **Faculties** Ledger (by group) Calendar Add transaction Transfer money Credit batches Reconcile account

Financial statement

Beacon User Guide

Hover mouse over captions for more information

Beacon Website

u3a Beacon Users' Forum

2. Sign In – Then Select Your Option



You should return to this page to Log Out. But if you forget, it will time out.













Click on the 'Groups link to access the Groups listing page:



2. Groups Listing page



Home - Add New Group

Groups

Faculty - any or none - Sha

Operations at bottom of pa

A B C D E F G H I J K L M N O P Q R S T

NOTE: the Max group size, current group numbers and hence number on waiting list is shown here:

Use the index at the top or scroll down to your group name. Your group will be highlighted in blue. Click on its title to open.

You'll only have access to your own group(s)

Select	Group	Active	When	Where	Coordinators	Members	Max	Waiting
A Y	A							
	Ageing in 21st Century (A21C)	Υ	3.00 pm on Wednesdays every fortnight		Georgia Lepper	14	14	
			Vivek Nanda					
	Ageing Now	Υ	1st + 3rd Wednesday of Month	Not fixed	Ruth Green	10	12	
					Cheryl Wells			
	Al: The Coming Wave	Υ	1st Friday of the month		Georgia Lepper	12	12	
	Art in London	Υ	At least once per month	Not fixed	Anne Ferguson	127	150	
					Cheryl Wells			
	Art: i-Pad Painting & Drawing	Υ	Monday 10:30, every two weeks		Patricia Biddiscombe Fyans	9	9	1
					Gill Hopkins			
	Art: Life Drawing	Υ	Every Monday		Chris Coe	27	22	6
					Alison Shipton			
	Art: Sketching in the City	Υ	Monthly 2nd Wednesday 14.30	Not fixed	Judith Pedersen	1	10	
Y A	В							
	Birdwatching	Υ	Two visits per month	Not fixed	Janet Drake	92	500	
					Derek Harwood			
	Book Group - German	Υ	Monday at 10:00, approx every 6 weeks	Gay	Vivienne Gay	10	12	
	Book Group - Science Fiction	Υ	Friday at 14:00, every 5 to 6 weeks		Jenni Chan	9	0	1
_	Book Group - Short					_		





It will open on this page, at the 'Details' tab.

There are 4 tabs.

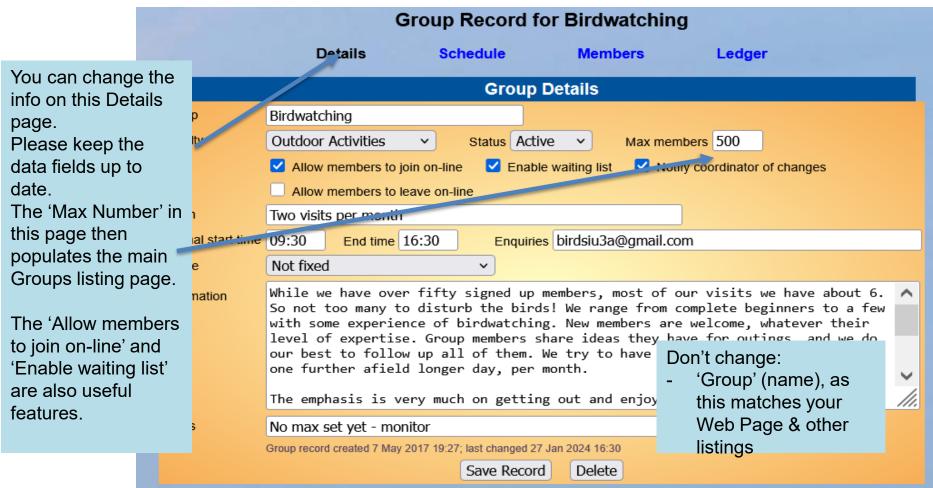
We will look at:

- Details
- Schedule
- Members
- no iu3a Group uses 'Ledger'.



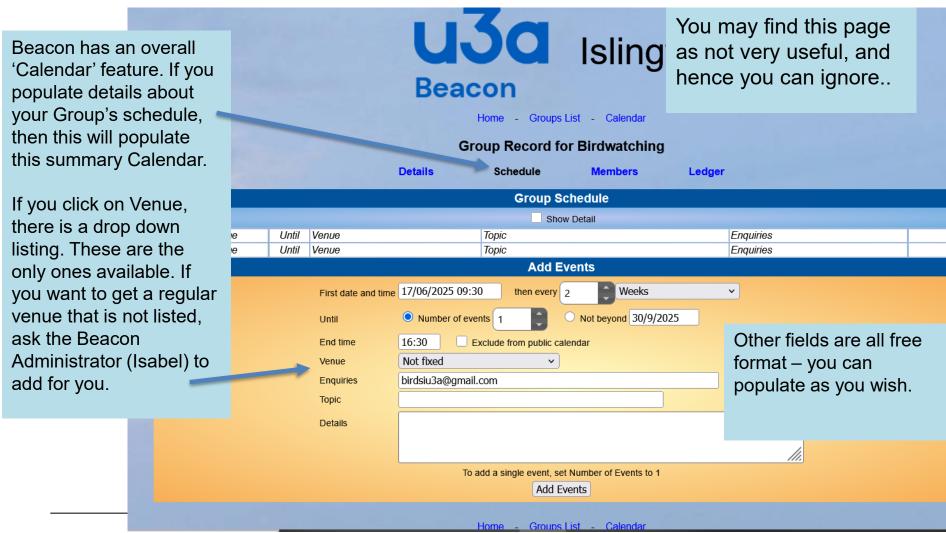






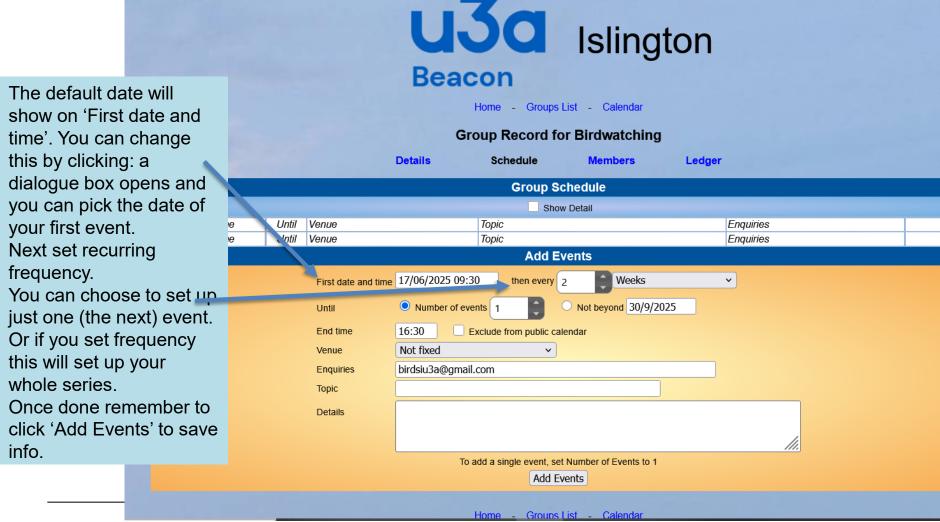
4. Select Your Group - & Choose an Option, Schedule















Recurring Frequency (allowing for 5 week months):

- If your group meets, say, once a month, then it's straight forward select 1 then Months
- If your group meets, say, twice a month, then you have to set up the first one (eg the 1st week of every month) pick the date for the 1st meeting then select 1 then Months
- Once you set these up (clicked on Add Event), you need to then add your second meeting pick the date for your first second meeting (eg the 3rd week of every month) then select 1 then Months. Again save, ie click on Add Event.
- In summary you will now have a listing showing meetings in eg the 1st & 3rd week of every month (regardless if there are 4 or 5 weeks in that

5. Group's Membership



Home - Groups List													
Group Record for Birdwatching													
Details			Schedule	Men	Members								
There are no Waiting Members													
Group Members													
Select	Member No.	Name	Telephone	Mobile	Status	Waiting							
	16434	Mary Adshead			Current		remove - make coordinator						
	Emergency of	contact: Will Adshead											

One key purpose of Beacon is to ensure only signed up iu3a Members join Groups.

- When you select the 'Members' page it will list all the current group members (If you have utilised this function see next slides)
- Any showing in RED have not renewed and should be removed from your group (& advised they can no longer attend your group)
- This check will be particularly relevant around October/November each year when subscriptions are renewed

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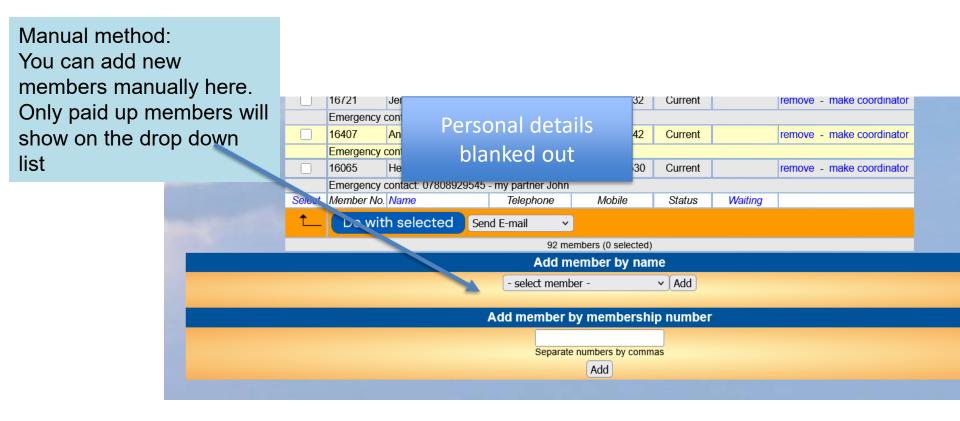




- There are two methods for a iu3a member to join your group:
- The manual way (ie the non-Beacon way): You become aware of a members asking to join your group (non Beacon) means, eg somebody sending you an email through your iu3a web page. You can then manually add this person to Beacon (see Slide 28)
- Members can access Beacon directly, and if you've ticked this option on your Beacon group home page (see slide 17), their name will appear in the list and you get a notification from Beacon.











Automatic method:

On your 'Details' page, if you have ticked this option, then members can request to join your Group You'll get a Beacon notification. The person will be shown in your list. Then you can accept them into the Group, or not.







To allow online joining of your group you need to:

- sign in to Beacon as Coordinator, go to your page, it opens in 'Group Details'
- at the top tick:
- 1. Allow Members To Join On line',
- 2. 'Enable Waiting'
- 3. 'Notify Coordinator'
- Once you get the email notification that someone has signed up on line you can, if you want to send them a standard welcome email from within Beacon, or some other way.





- If someone advises you they are dropping out of your group, you should remove their name from the Beacon list.
- This will also ensure that your correct current membership size is reflected correctly on the full Groups Listing page
- Through this mechanism by all Coordinators it will then be known that only current iu3a members are members of groups, which Groups are full, and at any time who is attending which groups (important re deaths).





- Again, if you've ticked this option on your Details sheet then it is possible for a member to request joining your group through Beacon even if your group is currently full.
- You have to have set a maximum number allowed in your Group for this option to work.
- The potential new member will be shown but shown as "waiting". You can accept, or not.



A5. Group's Membership - Waiting



17/06/2025

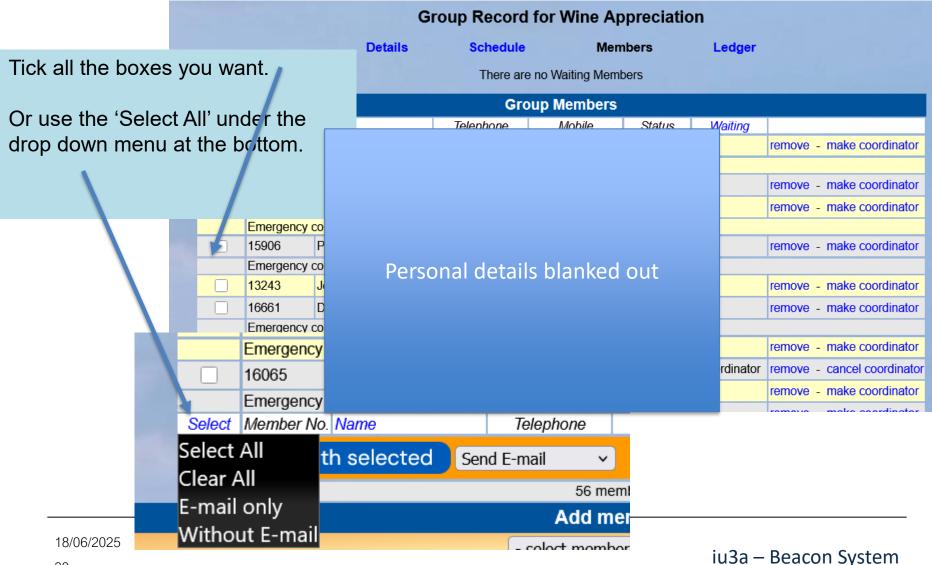
6. Emailing Your Group Members



- If you need to contact a member by phone, eg because of a last minute change or cancellation, you will have access to this information in Beacon
- You can email all current group members (plus those on your waiting list) from Beacon (see next slide)
- All emails sent from Beacon are sent "blind" (same as the "bcc" option from you gmail group account). This ensures no release of personal data, hence compliance with GDPR and our Privacy Policy
- When you select your Group it will list all the current group members with current email address and other details
- The Beacon email provider is more secure from hacking than using your own personal email account

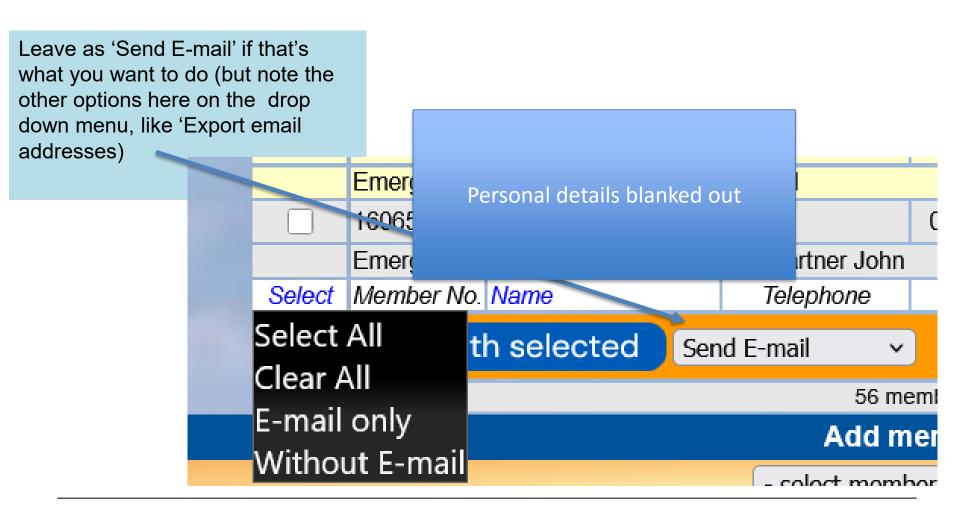






6. Emailing your Group Members

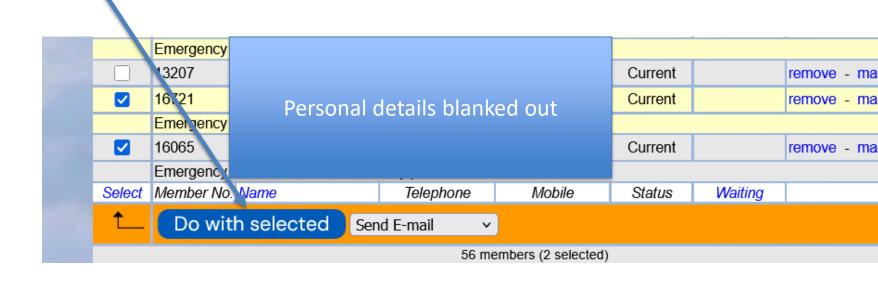






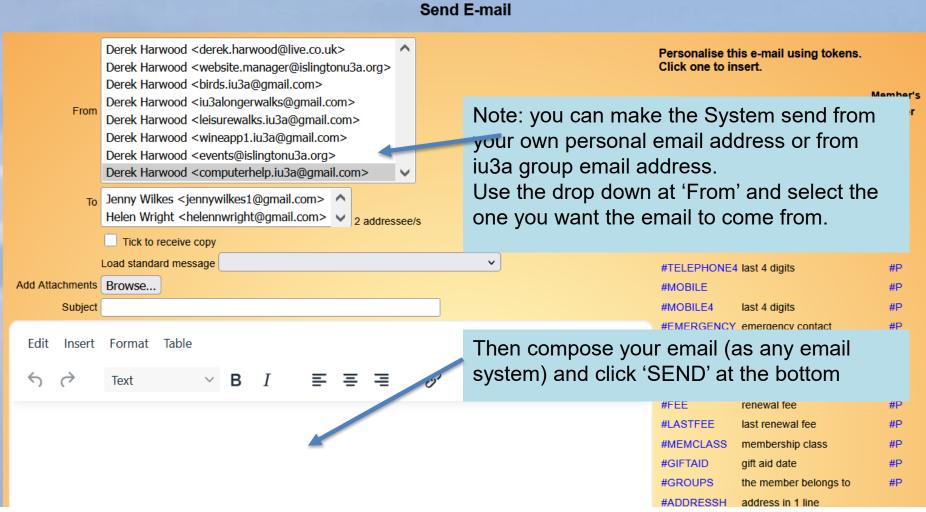


Next you have to click on 'Do with selected'.





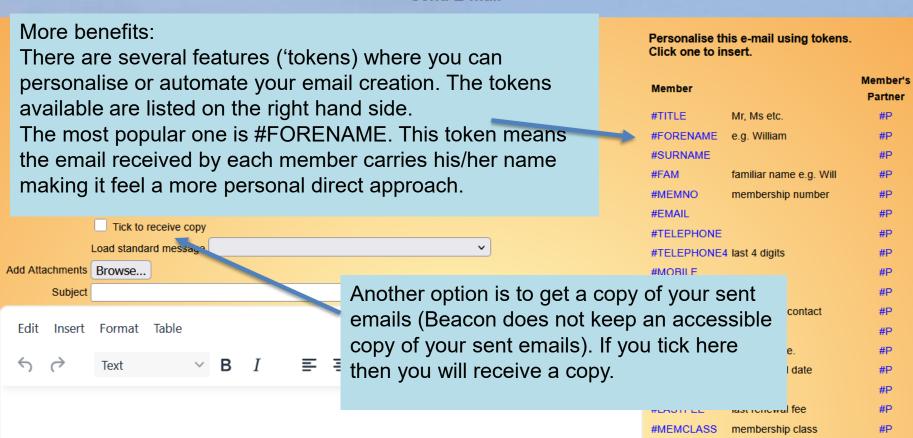








Send E-mail



the member belongs to

gift aid date

address in 1 line

#GIFTAID

#GROUPS

#ADDRESSH

7. Standard Emails



- •If you want to keep a regular email that you send to your group members from Beacon you can create & save this within Beacon
- •Just follow the process for emails as explained in the previous few slides then you can see on that screen there is box called 'Load standard message'
- •If you select this you will see a drop down with a variety of messages already saved (by other iU3A Coordinators or Committee Members)
- You can use one of these and tweak it for your need or create an email from scratch

Send

Save as standard message

To insert or edit website links, you must use the deltool above.

Set URL to the full website address and Text to Display to the text that the user should click

Do **NOT** display the website address

7. Standard Emails



- •Once you've created your email –with your preferred title (which should always include your Group's name) -you will see at the bottom of the screen an option called 'Save as standard message', click on that
- •Your standard message is now saved to the list of templates so you can find and use it in the future.
- •Note: these standard messages are common for all of Beacon, all Groups. They are not saved just to your Group's area. So don't mess up someone else's standard message!
- •Please delete any old ones you've previously created but don't need now.

8. Ongoing Support



- You are never alone! Isabel Dickson is iu3a's Beacon Administrator and for any query can be reached on: info.iU3A@gmail.com
- This tutorial is on-line on the 'Members' web page, for future reference & to allow you, at your own pace to explore the use of Beacon.
- Or you can come to the monthly IT Help session for help or guidance on Beacon.
- House calls can be provided for one to one training at your convenience.

Please contact Isabel or Lisa if you would like further training.

B. Members Access



- iU3A Members have access to Beacon from a link on the iU3A Web pages
- Once in Beacon Members can then see what Groups are running, their details (eg schedule and location), and join groups
- Members can update their own personal information, eg if they change email address
- Coordinators should post information into the Schedule (eg the next book to be read for a Book Group) in order to share information with their group members
- Separate Tutorial available for 'Beacon for Members'.