

IT Tools for u3a Group Coordinators

We keep our records using the data base system designed for and by u3a members, **Beacon**. In a separate package, authored by Phil Green¹, we provide public access to a **Calendar** of group activities.

1. An introduction for Beacon Users

Beacon Users are u3a members who need to access and modify the branch database, for instance committee members and group coordinators. Other members may view their own records and the branch calendar, but cannot make changes.

Permissions: Different users can see different sections of the database: for instance, the Treasurer has access to all the financial information. In the case of **Group Coordinators**, you are able to see and edit all the details for your group.

i. Logging into Beacon

In your favourite web browser, go to **u3abeacon.org.uk** You'll see this



- When you first log in, your **username** and **password** will have been sent to you in an email from the Beacon Administrator (see **Contacts** at the end to find out who that is).
- Choose **Howden & District** from the drop down list
- Enter your username & password. Click **Enter**
- When you first log in you'll be asked to **change your password**.
- You have **24 hours** to do this from the time of the administrator's email.
- If you time out, send the administrator an email.
- The next time you login, use the password you've set up.

Beacon Login TIPS

¹ p.green@sheffield.ac.uk

- To save time, put the Beacon Login page in your bookmarks or favourites bar
- Occasionally you may see the login page on a white background. If so, go back and start again.
- When you are in Beacon, there's a link to the **user manual** at the bottom of the landing page (i.e. the first page you see when you're in, see below). The manual is your source of reference.

ii) What Beacon provides

When you've logged in you will see the **landing page**, which provides links to what's available to you in Beacon. Here's the full list, which the administrator sees:

The screenshot shows the 'Administration' page for 'u3a Beacon Howden & District'. The user is logged in as Phil Green. The page features a grid of administrative links organized into five columns: Membership, Groups, Finance, Misc, and Set up.

| Membership | Groups | Finance | Misc | Set up |
|---------------------|-----------|----------------------|----------------------|----------------------|
| Members | Groups | Ledger (by account) | Audit log | System users |
| Add new member | Venues | Ledger (by category) | U3A officers | Roles and privileges |
| Membership renewals | Faculties | Ledger (by group) | Public links | System settings |
| Recent members | Calendar | Add transaction | Data export & backup | System messages |
| Non-renewals | | Transfer money | E-mail delivery | Finance accounts |
| Membership cards | | Credit batches | E-mail unblocker | Finance categories |
| Addresses export | | Reconcile account | Personal preferences | Membership classes |
| Statistics | | Financial statement | | Member statuses |
| | | Groups statement | | Poll |
| | | Gift Aid declaration | | |

At the bottom of the page, there is a 'Help' button and three links: 'U3A Beacon Users' Forum', 'Beacon User Guide', and 'Beacon Website'.

Other users won't get everything: for instance, as a **Group Coordinator** you'll see the **Groups** column but not the Finance column:

The screenshot shows the 'Administration' page for 'u3a Beacon Howden & District'. The user is logged in as Paul Eeles. The page features a grid of administrative links organized into five columns: Membership, Groups, Finance, Misc, and Set up. The Finance column is hidden.

| Membership | Groups | Finance | Misc | Set up |
|------------|-----------|---------|----------------------|--------|
| | Groups | | E-mail delivery | |
| | Venues | | Personal preferences | |
| | Faculties | | | |
| | Calendar | | | |

At the bottom of the page, there are three links: 'U3A Beacon Users' Forum', 'Beacon User Guide', and 'Beacon Website'.

iii) Group Records

Click **Groups** and select your group from the list. Groups which you coordinate will appear in **blue**. e.g., here's the record for the Transport and Industry History group:

You can fill in or edit **the group details**: a brief introduction, where and when you meet etc. It is a good idea to set a maximum number for your group & to tick the “Enable waiting list” & “Notify coordinator of changes” boxes.

Under **schedule** you can give more details of meetings.

| Date & Time | Until | Venue | Topic | Enquires | |
|-----------------------|-------|------------------------------|---------------------------------------|----------|-------------|
| Mon 17 Oct 2022 11:00 | 12:00 | Scolfield Village Hall - map | Hull to Doncaster Railway in Pictures | | edit delete |
| Mon 21 Nov 2022 11:00 | 12:00 | Scolfield Village Hall - map | Transport Fun Quiz and Social | | edit delete |
| Mon 19 Dec 2022 11:00 | 12:00 | | No Meeting | | edit delete |
| Date & Time | Until | Venue | Topic | Enquires | |

Members

Under **members** you can add and remove members, and send an email to all or some of your members. Here we've hidden personal details:

| Group Members | | | | | | | |
|--------------------------|------------|------|---------|-----------|--------|---------|---------------------------|
| Select | Member No. | Name | Address | Telephone | Mobile | Status | |
| <input type="checkbox"/> | 547 | | | | | Current | remove - make coordinator |
| <input type="checkbox"/> | 735 | | | | | Current | remove - make coordinator |

.. And at the end of the list...

| Select | Member No. | Name | Address | Telephone | Mobile | Status | |
|---|------------|------|---------|-----------|--------|---------|--|
| <input type="checkbox"/> | 236 | | | | | Current | coordinator remove - make coordinator |
| Do with selected Send E-mail | | | | | | | |
| 27 members (0 selected) | | | | | | | |
| Add member by name | | | | | | | |
| - select member - Add | | | | | | | |
| Add member by membership number | | | | | | | |
| <input type="text"/> Separate numbers by commas Add | | | | | | | |

Select which members you want Click here to perform the action [Alternative Actions](#)

I.e. you want to perform an action, (e.g. to send an email), involving a selection of your members (e.g. all of them). There are several other actions, (e.g. remove all the members you have ticked).

It is important to keep this register of group members up to date. Remove lapsed group members or lapsed u3a members by clicking in the right hand column alongside their name –[remove](#) – [make coordinator](#).

To print a list of group members, press the ctrl key & P on your keyboard simultaneously & this will bring up a print window. This is a very useful document for you to have with you at all your meetings.

To send an email to your group members

This is the safest way to contact your group. Click [Select](#), then select All, then click “Do with selected” This brings up an email box with a list of your members email addresses at the top. You can then write an email in the usual way.

To add a file or document to your email as an attachment click “Choose File”

As Group Coordinator always include yourself in the email select process then you will receive a copy of the email to your own email address for your records. Alternatively, you can use the **tick to receive copy** box.

Beacon also allows you **to personalise emails** so they are addressed to each individual (Dear John...), and to create standard messages to avoid starting again. Follow [this link](#) for the manual details.

2. Group Finance on Beacon

Group Ledger

The Group Ledger is used to **record the group's financial transactions**, in and out: Note that your ledger on Beacon is **NOT** connected directly to the u3a bank account that the treasurer keeps. Your Group Ledger may be checked by the treasurer. **It will be audited.**

On your group home page click **Ledger**.

This will open to a screen with an **in/out ledger**. Example below for a fictitious Wine Tasting group:

| Group Ledger | | | | | | |
|-----------------------------|------------------|-------------------|--------|--------|---------|-------------------------------|
| From 1/1/2025 to 31/12/2025 | | | | | | |
| Date | Payee | Detail | In | Out | Balance | |
| | | Brought forward | | | £0.00 | |
| 14 Oct 2025 | Skelton VH £20 | BOOKING for 14/10 | | £20.00 | -£20.00 | edit - delete |
| 14 Oct 2025 | Wine Tasting a/c | Subs RECEIVED | £50.00 | | £30.00 | edit - delete |
| Date | Payee | Detail | In | Out | Balance | |

[Download Excel](#)

| Add transaction | | | | | |
|-----------------|-------|--------|----|-----|--|
| Date | Payee | Detail | In | Out | |
| 02/09/2025 | | | | | |

[Save](#)

The **From & To** dates just beneath the Group Ledger heading will be the current financial year.

The **brought forward** figure on the top line is the money remaining on your group balance from the previous accounting financial year. If your group has financial records for past years then these can be **viewed only** by simply changing these dates to the previous financial year. **N.B.** You must **not** alter any transactions within a previous financial year as these form part of the official audited accounts of our u3a.

Each line in the ledger records a transaction. *In our example, the Wine Tasters held a meeting on 14th Oct at Skelton Village Hall. The hire charge for this meeting was £20. At the meeting £50 of subs were collected. On 16th October Skelton Village Hall was paid £20.*

Incoming transactions will mostly correspond to subs paid by your members to cover the group's activities, e.g.

| | | | | | |
|-------------|------------------|---------------|--------|--------|-------------------------------|
| 14 Oct 2025 | Wine Tasting a/c | Subs RECEIVED | £50.00 | £30.00 | edit - delete |
|-------------|------------------|---------------|--------|--------|-------------------------------|

Mark Incoming transactions as **RECEIVED**

Outgoing Transactions cover costs you have incurred on behalf of your members, e.g. for room hire:

When the expense occurs, create an entry like so:

| | | | | | |
|-------------|----------------|-------------------|--------|---------|-------------------------------|
| 14 Oct 2025 | Skelton VH £20 | BOOKING for 14/10 | £20.00 | -£20.00 | edit - delete |
|-------------|----------------|-------------------|--------|---------|-------------------------------|

You should create this line **at the time you make the booking**, not when you pay for it.

When an invoice arrives and payment is made, mark the transaction as PAID by editing the BOOKING line by adding PAID and the date of payment:

| Group Ledger | | | | | | |
|--------------|--|------------------|------------------------------|--------|--------|---------|
| Date | | Payee | Detail | In | Out | Balance |
| | | | Brought forward | | | £0.00 |
| 14 Oct 2025 | | Skelton VH £20 | BOOKING for 14/10 PAID 29/10 | | £20.00 | -£20.00 |
| 14 Oct 2025 | | Wine Tasting a/c | Subs RECEIVED | £50.00 | | £30.00 |
| | | | | | | |

[Download Excel](#)

Add transaction

To add a new transaction, fill in this

| Add transaction | | | | | |
|-----------------|-------|--------|----|-----|--|
| Date | Payee | Detail | In | Out | |
| 06/08/2025 | | | | | |

[Save](#)

And hit **Save**

To edit a transaction, click its **edit-delete** cell, make your changes and hit **update**.

3. On-line group calendar

The idea here is to enable anyone who is looking at our web site to see what events are coming up.


From our [web site](#), there is a link to an **on-line calendar** of group events that anyone can view but not edit. On the web site, go to the [Groups](#) Section and click the link in the 3rd paragraph. The on-line calendar looks like so:

1owdenu3a@gmail.com
 today November 2022
 Print Week Month Agenda
 Mon 31 Tue 1 Nov Wed 2 Thu 3 Fri 4 Sat 5 Sun 6
 10:00 committee
 14:00 Rummikub
 10:00 Ukas Adv
 10:30 Strollers
 09:40 Racketball
 10:00 Thurs Recorders
 14:00 Classic Films
 14:00 Music Appreciati
 10:30 Gardening
 14:00 Scrabble
 10:00 History 2
 10:00 Recorders
 10:00 Ukas Intermedia
 09:40 Racketball
 10:00 Walkers
 10:00 Astronomy
 14:00 Art
 10:00 Science
 09:40 Racketball
 10:00 Thurs Recorders
 10:30 Horticulture
 10:00 Family History
 10:00 Photography
 10:00 Transport
 14:00 Scrabble
 10:00 Ukas Intermedia
 14:00 Scrabble
 10:30 AGM & The BIG
 14:45 Racketball
 10:30 Poetry
 14:00 Art
 10:30 Yorks History
 14:30 Baking
 09:40 Racketball
 10:00 Thurs Recorders
 14:00 Classic Films
 14:00 Music Appreciati
 10:00 Photography
 Events shown in time zone: United Kingdom Time
 GoogleCalendar

Be clear that this has nothing to do with Beacon. Beacon does provide a calendar, but to get at it you have to go through the member's portal, for which you need your membership number. What we need is a calendar which anyone can see, but **only the Administrator and Group Coordinators can edit.**

Please check the entries for your group in the calendar. If you find mistakes, you can ask the Administrator to correct them, or you can do it yourself. Here's how:

Editing the on-line calendar,

- The calendar is attached to a google account **howdenu3a@gmail.com** . You can see that in the top left above.
- There is a **link to the calendar which will display it in a web browser and let you edit it.**
- It would be difficult and insecure to put the link in this document so instead we will **send it to you by email.**
- **To make a new entry**, click on its date, fill in the form which appears and **save** it.
- **To edit an existing entry**, click on it and then click the pencil icon at the top of the drop down window. Make your mods and then save.
- **You can set items to repeat** e.g. every Tuesday, 3rd Thursday..
- **If you have your own google account** (i.e. xxxxx@gmail.com) then you will have been provided with your own calendar. You can superimpose the u3a calendar on that. Here's how:
 - **Get into your gmail and click the apps icon**  on the top right
 - Select **calendar** from the drop down list
 - On the left there is a **list of calendars** which are being displayed.

- At the bottom of that list, click + to add other calendars. Add howdenu3a@gmail.com
- This is really nice if you're keeping your own calendar