

# U3A Beacon Management System

## User Guide

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## Some tips when using Beacon

### A1 Links and buttons

- Words in blue are links which when clicked usually take you to a different page. This will usually replace the current page. However, if you hold down the **Ctrl** key when clicking a link or when pressing a button, the new page will appear in a new tab. **This is a very useful facility and can be used to look up or edit other information without closing the current page. Please try to remember it.**

*For example:* you may wish to examine a member's record without closing the list of members. When you return to the first page (simply by clicking its tab) it will not have reloaded and therefore its position will not have changed making it easier to go to another member.

*Note:* In some pages data in the first page will be automatically updated to reflect edits made in the second page. However, in other pages this has not yet been implemented and changes will not be shown until the page is refreshed.

- If you are unsure what a link or button does, hover the mouse over it and a tooltip will often give you an explanation. After a while tooltips close themselves. You can speed this up by clicking on an empty part of the page.

### A2 Page layout

- Links appear at the top of all pages (except the home page) and at the bottom of longer pages. Clicking one of these links takes you to a different page (or sometimes an empty record of the same type as the present page).
- Filters to change the data you see are usually near the top of a page, under the links.
- Operations on the current page are carried out through buttons near the end of the page, sometimes integrated into the end of a list.

### A3 Table lists

- Many lists have the letters of the alphabet in a row above the list. Clicking on one these letters will scroll the list to the first item in the main column (such as a member's surname or group name) starting with that letter.
- Orange bands act as alphabetic dividers in some lists (though this may depend upon the current list sort order). At the left end of these bands are up and down arrows. By clicking these, the page will scroll to its top or bottom respectively. Large arrows in circles on the right side of some pages will also scroll to the bottom and top of the page.
- Many lists have some of the titles in the header row shown in blue. By clicking on these links, the list will be reordered, sorted by the selected column. However, a link in a Select column has a different function. Clicking on the link will either bring up a menu by which to select items (for example, members with or without e-mail) or it will toggle the state of all the checkboxes in the column. The column tooltip will clarify the function.

### A4 Drop-down lists

- If a drop-down list is long, you can jump quickly to the first entry starting with any particular letter by focusing the list (just click on it) and then pressing the letter on the keyboard.

- Successive presses of the same letter will step through the list one entry at a time. This can sometimes be quicker than scrolling through the list.

#### **A5 Back button**

- Pressing your browser's **Back** button may not always do what you expect. It is recommended not to use the **Back** button but to navigate using the page links.

#### **A6 Calendar controls**

- Calendar controls are provided to change date fields. Click in the field to display the calendar control.
- You select a date by clicking on the day number.
- You can change the month or year by selecting from the drop-down lists at the top of the control or by stepping through months using the small arrows on either side at the control top. After changing the month or year, you must click on the required day number in order to close the control and accept the selected date.
- If shown, you may use the **Today** button to move to the current month. You must still, however, click on the current day number which will be highlighted.

# 1 Introduction

U3A Beacon is an on-line facility for managing U3A local associations, particularly with regard to membership, finance and groups. It is located at <https://u3abeacon.org.uk> and is accessed by username and password, allocated by each U3A site administrator.

All U3As are co-hosted on the same server, with comprehensive security arrangements to ensure that the data of each U3A is effectively isolated from that of all others. Moreover, the encryption key used to encrypt sensitive data fields is different for every U3A.

The system is accessed by an internet browser and can therefore be used on most computers. Recommended browsers are Firefox and Chrome but other browsers are also generally compatible.

## 2 Logging in

Upon launching the system, a log-in screen is displayed. Select the U3A you require, enter your username and password and press **Enter**.

- You are allowed three attempts to log-in. If the third try fails, another log-in attempt will not be accepted for 15 minutes. You may avoid this delay by closing and reopening your browser. If you continue to be unable to log-in, seek the assistance of your system administrator who will confirm your username and may reset your password.
- Usernames and passwords are case-sensitive. Make sure that you are not inadvertently in Caps Lock mode.
- Passwords should be typed, not pasted. Correct verification will not take place for pasted passwords.
- If you have not used the system before, or if your password has been reset by a system administrator, you will have to change your password at first use. See 8.5.
- If you are using a private computer, you are recommended to tick the checkbox below the Enter button in order to make the system easier to use by storing local settings. However, if you are using a public or shared computer, you must not tick this checkbox to avoid a possible security breach. In this case, always make sure that you log out when you have finished using the system.
- If you have forgotten your username or password, use the **Click here** link. See 8.4.
- If you are logging in as a Site Administrator, you will be asked to supply an e-mail address if you have not previously done so. Without this you will not be able to send e-mails.

## 3 Home page

After normal log-in, you will find yourself in the home page from where all of Beacon's functionality may be accessed. Look out, too, for any site or system messages that may be displayed.

- From any other page you can click on the **Home** link at the top of the page (and sometimes also at the bottom) to return to the home page.

The operations are grouped under **Membership, Groups, Finance, Misc** and **Set up**. However, you will only see those operations for which you have been assigned access rights. This may mean that for some users, some headings have no operations beneath them.

It is the case throughout Beacon that operations, links and buttons will be hidden if you do not have sufficient access rights to use them. If you feel that you do not have sufficient access rights to do what you need to do, contact your U3A site administrator.

## 4 Membership operations

### 4.1 Members list

To display a list of members, click **Members** on the home page. By default, all current members will be shown, in order of surname.

The filters at the top allow you to restrict the list by membership status (**Show**: one or more), **Poll**, membership **Class** or last **Payment type**. **Negate poll** can be used to show all members except those assigned to a particular poll. As you change the filters, the page will reload.

The **Quick Find** box at the top may be used to search quickly for full or partial matches in a member's name, 'known as', street, town, postcode, telephone or membership number. Enter the text or number you want to match and press **Search**. When you have finished searching, press **Cancel Search** to return to normal operation.

- Telephone numbers: If a member does not have a Telephone number but does have a Mobile, this is shown the Members List.

#### 4.1.1 To access a member's record

In this list or elsewhere where a member's name has a blue link, click the link to go to the member's record. You may also click on the membership number. See 4.2.

#### 4.1.2 To send an e-mail to one or more members

Tick the required members in the **Select** column. You may also click on the column header to display a selection menu by which to make defined selections.

Near the bottom of the page, select **Send E-mail** in the drop-down list and then press **Do with selected**. An e-mail form will be displayed (see 4.10).

#### 4.1.3 To send a letter to one or more members

Tick the required members in the **Select** column. You may also click on the column header to display a selection menu by which to make defined selections.

Near the bottom of the page, select **Send Letter** in the drop-down list and then press **Do with selected**. A form on which to compose the letter will be displayed (see 4.11).

#### 4.1.4 To download a list of members

Tick the required members in the **Select** column and then either **Download Excel** or **Download PDF** in the drop-down list at the bottom of the page. Press **Do with selected**.

#### 4.1.5 To download e-mail addresses

This facility downloads an Excel spreadsheet containing e-mail addresses and members' names. It could be used for importing into MailChimp.

Tick the required members in the **Select** column, select **Download E-mail addresses** in the drop-down list and press **Do with selected**.

#### 4.1.6 To add members to a group

Tick the required members in the **Select** column and then **Add to group** in the drop-down list. Select the group to which the members are to be added in the list of groups that will have been revealed. Press **Do with selected**.

*Note:* members are normally added to groups through the group record.

#### 4.1.7 To add members to a poll

Tick the required members in the **Select** column and then **Add to poll** in the drop-down list. Select the poll to which the members are to be added in the list of polls that will have been revealed. Press **Do with selected**.

### 4.2 Member record

There is a member record for every member. Member records can be accessed by clicking on a member's name highlighted in blue in the list of members and elsewhere throughout Beacon.

The fields in the upper part of the record relate to that member alone. However, the address fields at the bottom may be shared with another member if the **Share address with** list is selected.

The **Joined** and **Next renewal** dates are set automatically by the system and will not normally need to be touched. They may, however, be overridden manually.

If left blank, the **Initials** field will be completed automatically from the members **Forename(s)**. However, the system will not override **Initials** set by the user.

Optionally, a **photo** may be uploaded for the member. Press the adjacent button (the style of which varies between browsers) and select an image file of type jpg, png, gif or bmp. Maximum size 2MB.

Note that a (landline) **Telephone** is part of the address record (and situated at the end of the address information) while a **Mobile** number is part of the member record.

To un-share an address (perhaps because one of the partners is no longer a member), select <no-one> at the top of the drop-down list.

#### 4.2.1 Saving changes

After making any changes to a member record, press Save to commit them.

#### 4.2.2 Record deletion

Although a **Delete** button is provided to remove a member record, this should only be done if a member record has been created inadvertently (perhaps there is already a record for the member). When you delete a member record, the membership number is not reused.

In normal operation, member records should not be deleted but the status should be changed to **Lapsed** or some other non-current value. Member records must be retained for up to 7 years to comply with HMRC regulations for their associated financial transactions. At the end of this period, expired records are removed through the **Non-renewals** option on the Home Page.



### 4.2.3 Groups and finance

At the bottom of the Member Record page there are lists showing the groups to which the member belongs and the financial transactions that they are associated with. By clicking on the corresponding links, you may go directly to the group or transaction records.

## 4.3 Adding a new member

To add a new member manually, click **Add new member** on the Home Page, Members List or an existing Member Record. If you have PayPal services enabled, members may also join themselves on-line, which requires no manual intervention.

Work down the page from top to bottom. When you select the required type of membership, options further down the page may change. All fields with a caption in bold are mandatory.

At the bottom is shown the membership fee due. Enter the **Amount received**. Select the **Payment method** (and, optionally, enter a **Cheque no** where applicable) and the **Account** to be credited with the money received. Then press **Add member** to create a new member record and associated financial transaction. The member record will be displayed for confirmation.

If you enter an **Amount received** greater than the membership fee, the extra money will be accepted as a donation. If you enter too little money, you will be warned but can choose to disregard the warning if you have particular reason for doing so.

If an error occurs when adding a new member such that creation is aborted, the next membership number may already have been incremented. This may result in 'holes' in the membership number sequence. The same applies if an error occurs when someone attempts to join on-line.

## 4.4 Membership renewals

To manually renew members, select **Membership renewals** on the Home Page. If you have PayPal services enabled, members may also renew on-line which requires no manual intervention.

|   |
|---|
| <p><b>IMPORTANT: Members should only be renewed by this facility or on-line. Do not change the member record or enter a transaction directly.</b></p> |
|---|

By default, a list is displayed of members from the last membership year who have not renewed this year. However, by selecting the **Previous years** radio button near the top of the page, members who have not renewed for one or more years are displayed, so that they can now be renewed, retaining their original Member Record.

Above the list of renewals, select the **Account** to be credited with the money received and the **Payment Method**. Renewals can only be made against one account and payment method at a time.

Then, for each member to be renewed:

- Locate the member in the list and check that their address and other details are still correct. If that is not the case, click on their name while holding down the **Ctrl** key to display (in a separate tab) their Member Record. Make the changes required, save and close the Member Record. The information in the renewals list (still open in its own tab) will be updated automatically.

- If the member has a partner at the same address, both may be renewed together. To do this, tick the checkbox in the **Incl Partner** column when both names will be grouped together and the expected renewal fee will be adjusted.
- Enter the amount received in the **Received** column. Any amount above the expected fee **Due** will be treated as a donation.
- Tick the checkbox in the **Select** column for the member.

When you have processed a number of renewals (it is recommended not to do too large a batch at a time in case an error occurs), select **Renew selected members** from the drop-down list and press **Do with selected** at the bottom of the list.

If the payment method is by cheque, a confirmation page will be displayed of the renewals made. Here you may enter a **Cheque No** for each renewal. Press **Update** to save this. You do not need to press **Update** if you do not want to enter any cheque numbers.

#### 4.4.1 To send an e-mail to members who have not renewed

Select the members to whom an e-mail is to be sent. At the bottom of the page, select **Send E-mail** from the drop-down list and press **Do with selected**. An e-mail form will be displayed (see 4.10).

#### 4.4.2 To send a letter to members who have not renewed

Select the members to whom a letter is to be sent. At the bottom of the page, select **Send Letter** from the drop-down list and press **Do with selected**. A form will be displayed to compose the letter (see 4.11).

#### 4.4.3 To add members to a poll

Tick the required members in the **Select** column and then **Add to poll** in the drop-down list. Select the poll to which the members are to be added in the list of polls revealed. Press **Do with selected**.

### 4.5 Recent members

A list of people who have become members recently may be displayed by selecting **Recent members** on the Home Page. This list includes members who have been entered manually and also those who have joined on-line.

The period for which new memberships are shown is set by the calendar controls at the top of the page.

#### 4.5.1 To download the list of recent members

Select the members to be downloaded using the checkboxes or click on the **Select** column header to display a menu of common selections. Then, at the bottom of the page, select **Download names as txt file** and press **Do with selected**. One use for this option is to import a list of new members into a U3A magazine.

#### 4.5.2 To send recent members an e-mail

Select the members to whom an e-mail is to be sent. At the bottom of the page, select **Send E-mail** from the drop-down list and press **Do with selected**. An e-mail form will be displayed (see 4.10).

### 4.5.3 To send a letter to one or more recent members

Tick the required members in the **Select** column. You may also click on the column header to display a selection menu by which to make defined selections.

Near the bottom of the page, select **Send Letter** in the drop-down list and then press **Do with selected**. A form on which to compose the letter will be displayed (see 4.11).

### 4.5.4 To add recent members to groups

Tick the required members in the **Select** column and then **Add to group** in the drop-down list. Select the group to which the members are to be added in the list of groups that will have been revealed. Press **Do with selected**.

*Note:* members are normally added to groups through the group record.

## 4.6 Members who have not renewed

Select **Non-renewals** from the Home Page to show a list of members who have not renewed their membership.

This list operates in two modes, according to the option selected by the **Show** radio button at the top of the page.

### Annual non-renewals

With the first option, people who were members during the last membership year but who have not renewed this year are shown, allowing for the defined grace period before they are considered not to have renewed.

### 4.6.1 To lapse members

Select the members to lapse with the checkboxes, **Lapse** from the drop-down list at the bottom of the page and then press **Do with selected**. A confirmation dialog will be displayed. Press **Lapse** to proceed. The selected members will have their status changed from **Current to Lapsed**.

### 4.6.2 To send members an e-mail

Select the members with the checkboxes, **Send E-mail** from the drop-down list at the bottom of the page and then press **Do with selected**. An e-mail form will be displayed (see 4.10).

### 4.6.3 To send a letter to one or more members

Tick the required members in the **Select** column. You may also click on the column header to display a selection menu by which to make defined selections.

Near the bottom of the page, select **Send Letter** in the drop-down list and then press **Do with selected**. A form on which to compose the letter will be displayed (see 4.11).

### Long-term non-renewals

By selecting the second option under **Show**, a list will be displayed of members who have not renewed for 7 years. After this period there is no longer a requirement to keep financial records and the former members must be deleted completely from the system to comply with the Data Protection Act.

#### 4.6.4 To delete long-term non-renewals

Select the members with the checkboxes, **Delete** from the drop-down list at the end of the list and then press **Do with selected**. A confirmation dialog will be displayed. Press **Delete** to proceed with record deletion.

### 4.7 Membership cards

Select **Membership cards** from the Home Page or the Membership Renewals confirmation page. A list will be displayed of members who have recently joined or renewed and who are therefore flagged as outstanding, in need of a membership card.

By selecting a different radio button near the top of the page, you may instead show members based on a poll, a combination of outstanding members and a poll, or all current members.

By ticking **Advance expiry to next membership year** you can print cards with the expiry year incremented.

If you sometimes need to print extra cards for existing members who have not joined or renewed recently (perhaps because they have lost their cards), you can use a poll to identify these members and then print their cards at the same time as you print those for new or renewed members. In this way you do not have to do two print runs and you may better use card stock.

#### 4.7.1 To download membership cards

Select the members for whom cards are required with the checkboxes or **Select** header menu. Select **Download cards** at the end of the list and press **Do with selected**. A pdf file will be downloaded with the membership cards.

- If you wish to print onto an already partly used printer card, you may change **Print cards from sheet position** from 1 to the required starting card. Cards are numbered left to right then top to bottom.

#### 4.7.2 To print blank cards

You may wish to print a supply of blank cards (of basic design but without personal information) for giving to new or renewing members at a meeting when it would not be practicable to print actual cards. Select **Print blank cards** at the end of the list and press **Do with selected**. One sheet of blank cards will be downloaded as a pdf file. The file may, of course, be printed multiple times.

#### 4.7.3 To send members an e-mail

Select the members with the checkboxes, **Send E-mail** from the drop-down list at the bottom of the page and then press **Do with selected**. An e-mail form will be displayed (see 4.10).

#### 4.7.4 To send a letter to one or more members

Tick the required members in the **Select** column. You may also click on the column header to display a selection menu by which to make defined selections.

Near the bottom of the page, select **Send Letter** in the drop-down list and then press **Do with selected**. A form on which to compose the letter will be displayed (see 4.11).

## 4.8 Addresses export

You may wish to export members' names and addresses for a variety of reasons: for the distribution of Third Age Matters; to produce address labels for mailing; to supply the printer of your U3A magazine with addresses for its distribution, etc. The Addresses Export facility in Beacon provides a comprehensive way of supplying most needs for this information.

Select **Addresses export** from the Home Page.

Near the top of the page, select the **Format** you require. The data output varies according to the format selected. Formats are:

**Third Age Matters:** names and addresses in the format specified for TAM distribution;

**Labels:** for printing to standard sheets of printer labels; you may select the type of labels to be used;

**Excel:** names and addresses are exported as an Excel spreadsheet;

**CSV:** name and addresses are exported as a comma-separated-values file (which may be imported into many other types of software);

**TSV:** names and addresses are exported as a tab-separated-values file.

Next on the page follow three rows of filters which may be used to select the members to be exported. These comprise members statuses and classes, poll and group filters. By ticking **Negate poll**, all members except those assigned to the poll will be selected (subject also to the other filters).

Within the members displayed according to the filters, individual members may be selected using the **Select** checkboxes (together with the **Select** column header menu).

### To download the selected members

Press the **Download** button at the bottom of the list.

If the **Labels** format has been selected, options are displayed for changing the number and size of the labels according to the printer stock to be used. If you press **Save as defaults**, then the choices you have made will be retained on the current computer (assuming you selected the **Local computer** option when logging in).

You may also select the first label to be printed by changing **Print from sheet position**.

Press **Download labels** to download the labels pdf file.

## 4.9 Statistics

Select **Statistics** from the Home Page to display current totals of members by status and class. Also the male/female ratio of members and the number who have e-mail.

Press **Download PDF** to download this information as a pdf file.

## 4.10 Sending e-mails

E-mails may be sent from many places within Beacon. The Members List provides the ability to send e-mails to the whole membership or any part of it.

When an e-mail operation is selected, the **Send E-mail** page is displayed.

#### To send an e-mail

- The **From** address is taken from your member record. Additionally, if you are assigned to an office (see 8.3), the office e-mail address will also be shown and it will be the default. You should select the address that you want to use.
- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.
- Tick **Tick to receive copy** to receive a copy of the message.
- If you wish to send one or more attachments with the message, press the button next to **Attachments** (the format will vary between browsers) and select each file in turn. The files will be listed under the button. To remove any file, click on the small x before the filename.
- *Note: There is no practical limit to the number of attachments you can send with Beacon, but many e-mail servers impose limits on the number or size of attachments that recipients can receive. It is wise, therefore, not to send more than a few attachments with any one message and to minimise attachment size.*
- Enter a **Subject** for your message and then the message below.
- You may customise your message by inserting into the subject or message text any of the # tokens shown on the right (this does not apply to messages that are not sent to members). When the message is sent, these tokens will be replaced by the corresponding information for the member to whom the message is being sent.
- Press **Send** to send the message.

**All messages are sent to recipients individually.  
No recipient can see to whom else any message is being sent.**

#### Standard messages

If you send similar messages regularly (e.g. for membership renewals or reminders), they can be saved as standard messages and recalled for use again later. In that way you do not have to compose them each time.

To create a standard message, enter the **Subject** and the message (including tokens if required) and click **on Save as standard message**. You will be asked to give the message a name. Note that only the subject and message are saved, not the recipients or attachments.

To reuse a standard message, select the message by name from the **Load standard message** drop-down list. You may edit it, if necessary, before sending.

To remove a standard message, select it as above and then click **Delete standard message**.

#### 4.10.1 Website links

To enter a website link into your message, put the cursor at the position where the link is to be and press the **Link** button in the editor:



In the dialog that appears, enter the full **URL** (including the http or https prefix) and the **Text to Display**, noting the following.

To avoid your email being suspected of being spam because of the way our mail agent encodes URLs, the text to display should be a meaningful description of the webpage you are linking to rather than a copy of the URL.

By selecting from the **Link List** within the Link dialog, you can insert directly URLs for membership applications and renewals on-line. However, you will need to draft your own text to display.

- To edit a link, click on the link and then press the **Link** button.

### **E-mails sent through Beacon**

Beacon uses a commercial e-mail agent (SendGrid) to despatch messages and to provide us with details about progress. We have our own dedicated IP address so that our messages are not rejected because of misuse of the system by another party. However, all U3As using Beacon share this dedicated IP address, and a transgression by a user of one U3A could still affect everyone else.

We therefore require all U3As to ensure that the system is used responsibly and in particular to ensure that messages that could be construed as spam are not sent. **You MUST follow the guidelines now included in this guide as Appendix A.**

All messages sent by Beacon have a 'From' address of noreply@u3abeacon.org.uk and recipients will see them as having come from (for example) 'John Smith via MyTown U3A'. This is to circumvent problems with certain mail hosts, in particular AOL and Yahoo, whereby messages from users with e-mail addresses of these hosts may be rejected when coming from third-parties such as our mail agent.

Ordinarily, recipients can still reply directly to the sender (such as by pressing a 'Reply' button) as the 'Reply-To' header in the e-mail is set to the user's own address. However, a few mail programs may not do this.

The progress of messages can be monitored through E-mail Delivery. In addition, where messages are bounced, dropped or are the subject of spam reports, an e-mail will be sent by Beacon to the sender to advise them of what has happened. **All message failure reports should be treated seriously.** Rejected e-mail addresses should be verified, (most of them are simple spelling errors) and corrected or removed from Beacon as soon as possible if not proven to be valid.

Rejected addresses are added by our mail agent to a blacklist and any further attempt to send to these addresses will be rejected (with a 'dropped' error). We clear the blacklists periodically but you cannot expect this to be a frequent operation. You may ask for a specific address to be removed from a blacklist but you must first confirm that it is valid by sending a message to it, and receive a reply, outside of Beacon. We cannot assist in investigating why specific addresses are rejected.

## **4.11 E-mail delivery**

You can check upon the progress of e-mails sent, to see if they have been delivered. If the recipient views images in their emails, you can also see if and when the message was accessed by the recipient. You can see whether or not the recipient clicked on a website link within the message, such as to make a membership renewal.

Particularly when sending a message to many members, a check should be made that they have not bounced due to invalid e-mail addresses.

To check **E-mail delivery**, select this option from the Home Page (under Misc).

A list is displayed of messages sent in the last month by yourself, in chronological order with the latest messages at the top. With additional privileges, you may also be able to see other messages sent by the U3A.

To check the status of an individual message, click the small arrow on the left side. A list of all recipients will be displayed showing the message status for each of them. Message failures are shown in red. You can click on a member's name to go directly to the Member Record (see 4.2).

Statuses are:

**Despatched by Beacon**

The message has been sent to our e-mail agent.

**Processed**

The message has been received by our e-mail agent but not yet forwarded on.

**Deferred**

Our e-mail agent is unable to establish communication with the recipient's e-mail provider in order to forward the message on. The sending of Deferred messages is automatically retried at intervals over a day or more until repeated failures cause the message to be rejected.

**Dropped**

The message has been rejected by our email agent. This is either because the e-mail address was in an invalid format, or because a previous email to this address was Bounced or Reported as Spam. Such an email address is blocked by our email agent (we say it has been blacklisted), and can only be unblocked by the Beacon Team.

**Delivered**

The message has been accepted by the recipient's e-mail provider, though it may have gone to the recipient's spam folder rather than their inbox. Note that some email providers may silently bin the email without delivering it to a spam folder if the software guesses it is probably spam. Hotmail is particularly fierce in this regard.

**Bounced**

The message has been rejected by the recipient's e-mail provider, usually because the address is incorrect, disabled or no longer valid. The error message returned is displayed in red and should be examined. Invalid e-mail addresses should be removed from Beacon.

**Opened**

The message has been received by the recipient who has downloaded it onto his/her computer. Note that the method by which our mail agent detects this is by the automatic inclusion of a tiny image in the message. If the user has a setting where they don't view images in emails this **Opened** status will not be set, even though the recipient has read the text of the message. Therefore more recipients will have opened an email than is indicated by this status.

**Clicked**

A website link within the message has been clicked on by the recipient. The link clicked is indicated. In distinction to the above status the **Clicked** status should always be true if the user has clicked on the link in your message.



### Spam report

The message (or perhaps an attachment associated with it) has been rejected as spam. This is a serious situation that should be investigated immediately. An isolated spam report is not a disaster but repeated spam reports will damage Beacon's reputation and could adversely affect all users.

## 4.12 Sending letters

Letters may be sent from many places within Beacon and are particularly useful for recipients who do not use e-mail.. The Members List provides the ability to send a letter to the whole membership or any part of it.

When a letter operation is selected, the **Send Letter** page is displayed.

### To send a letter

- The list of addressees is displayed under **To**. This is for information only, they cannot be changed here.
- Compose the letter text in the editor.
- The # tokens shown on the right side can be inserted to personalise the letter for each recipient.
- Press **Download** to receive the letters as a pdf file which can be printed.

### 4.12.1 Standard letters

If you send similar letters regularly (e.g. for membership renewals or reminders), they can be saved as standard letters and recalled for use again later. In that way you do not have to compose them each time.

To create a standard letter, enter the message (including tokens if required) and click on **Save as standard letter**. You will be asked to give the letter a name. Note that only the message is saved, not the recipients.

To reuse a standard letter, select the letter by name from the **Load standard letter** drop-down list. You may edit it, if necessary, before sending.

To remove a standard letter, select it as above and then click **Delete standard letter**.

### 4.12.2 Website links

To enter a website link into your letter, put the cursor at the position where the link is to be and press the Link button in the editor:



In the dialog that appears, enter the full **URL** (including the http or https prefix) and the **Text to Display**. Normally the text should be the same as the URL so that recipients can copy and paste it into their browser if for some reason they can't link directly.

By selecting from the **Link List** within the Link dialog, you can insert directly URLs for membership applications and renewals on-line. However, you will need to copy the URL to the text field.

- To edit a link, click on the link and then press the **Link** button.

## 5 Group operations

*Note: The generic terms 'group' and 'group leader' are used in this User Guide. Beacon may be customised to display alternative terms such as 'course' or 'coordinator'.*

Groups list

To show a list of groups, click **Groups** on the Home Page.

By default only active groups are shown. To show all groups, untick **Show active only**. To display only those groups assigned to a particular faculty, select the **Faculty** in the drop-down list.

As well as basic information about each group, the current number of members of the group, the maximum number permitted and the number on a waiting list are shown.

### 5.1.1 To display a full group record

Click on the group name. See 5.2.

### 5.1.2 To send an e-mail to group leaders

Select the leaders to whom an e-mail is to be sent by ticking the checkboxes or using the Select column header selection menu. **Select Send E-mail to leaders** in the drop-down list at the end of the groups list and press **Do with selected**. An e-mail form will be displayed (see 4.10).

### 5.1.3 To download a spreadsheet of groups

Select the groups to be included with the checkboxes or **Select** column header selection menu. Select **Download groups** in the drop-down list at the end of the groups list and press **Do with selected**.

## 5.2 Group record

A group record may be displayed by clicking on a group name in the list of groups, or elsewhere where group names are shown.

The record comprises four sub-pages: **Details**, **Schedule**, **Members** and **Ledger**. You can select between these on the row beneath the group record title. The active sub-page has its name in black.

### 5.2.1 To create a new group record

Click **Add new group** in the list of groups or from an existing group record. At first only the **Details** sub-page is shown. Upon saving this, the other sub-pages will appear.

#### Group Details

This holds basic information about the group, including its **Faculty** (which is optional) and **Status**.

- The **When** field is free text and used only to give general information about when the group meets for publicity to members and the public. On the other hand, the **Start time**, **End time** and **Venue** are used as defaults when meetings and events are created. The **Contact** field can be used to give a person's name, telephone number or e-mail address for enquirers to make contact. **Max members** is the maximum number of members that the group can have. If more members are assigned to

the group, they are placed on a waiting list. If this field is blank or 0, there is no maximum number of members.

Press **Save record** to update any changes and **Delete** to remove the group record.

## Schedule

On this sub-page are shown future meetings or events of the group.

- To show extra detail about the meetings, tick Show Detail (if there is no additional detail, the display will not change).

### 5.2.2 To add new meetings or events

In the **Add Events** panel, select the date and time for the first event. Then select the number and frequency of events in the controls to the right. One frequency option will be something like *4th Sat of each month*. The number and weekday will reflect the date selected for the first event.

In the **Until** row, you may select either a fixed number of events to be created, or to create events repeatedly up to a selected end date.

When you have completed the other fields (which are optional but you should seek to give as much information as possible), press Add Events to create the new events.

### 5.2.3 To change an event

Click **edit** at the row end for the required event in the **Group Schedule**.

Make the changes required and press **Update**.

### 5.2.4 To remove an event

Click **delete** at the row end for the required event in the **Group Schedule**.

At present there is no facility to change or remove several events at a time.

## Members

This sub-page may be used to record U3A members who are also members of the selected group.

- If members are on the waiting list (because the group is full), the date since when they have been waiting is shown. Click **Join group** to make a waiting member an ordinary member of the group.
- If a member is not current, their name will be highlighted in red. They should be removed from the group if they do not renew.

### 5.2.5 To add new members to the group

This may be done either by selecting each member's name under **Add member by name**, or by entering the member's membership number under **Add member by membership number**. According to the way privileges have been assigned, one or both of these options may not be present.

- When a member is added by name, their address is shown for confirmation. If it is considered undesirable for group leaders to see any member's details in this way, then it is recommended that only **Add member by membership number** is enabled.

More than one member may be added at a time by membership number. Separate numbers by commas.

Press **Add** to add the selected members.

### 5.2.6 To remove members from the group

To remove individual members, click remove at the end of the member's row in the list of **Group Members**.

To remove more than one member, select the members to remove using the checkboxes or **Select** column header menu. Select **Remove Members** in the drop-down list at the end of the list of members, then press **Do with selected**.

### 5.2.7 To add or designate a group leader

A group leader must first be added as a member of the group. Then click **make leader** in the list to assign the role of leader. More than one leader may be assigned to any group.

### 5.2.8 To demote a group leader

Click **cancel leader** in the list row for the group leader. The person will remain a member of the group.

### 5.2.9 To send an e-mail to group members

Select the members to whom an e-mail is to be sent using the checkboxes or **Select** column header menu. Select **Send E-mail** in the drop-down list at the end of the list of members, then press **Do with selected**. An e-mail form will be displayed (see 4.10).

### 5.2.10 To download a spreadsheet of group members

Select the members to include using the checkboxes or **Select** column header menu. Select **Download Excel** in the drop-down list at the end of the list of members, then press **Do with selected**. You will then be asked which fields to include in the spreadsheet.

### 5.2.11 To download a pdf file of group members

Select the members to include using the checkboxes or **Select** column header menu. Select **Download PDF** in the drop-down list at the end of the list of members, then press **Do with selected**. You will then be asked which fields to include in the document. Note that it is possible to include photos (if available).

## Ledger

The present **Group Ledger** is a basic facility to assist group leaders to account for monies paid and received. There is at present no connection between these ledgers and the main Treasurer's ledger.

On entry, all transactions are shown for the group between the selected dates (which default to the current financial year) together with the incremental current balance.

### 5.2.12 To add a new transaction

Under **Add transaction**, enter the **Date**, **Payee** and **Detail** (the reason for the transaction). Then the amount, **In** or **Out**. Press **Save** to commit.

### 5.2.13 To edit or remove a transaction

For security reasons, transactions cannot be edited or removed. If an error has been made, add a new transaction but with reversed amount (**In <> Out**), to cancel the original.

## 5.3 Venues

To display a list of current venues, click **Venues** on the Home Page.

To show a venue record, click on the venue name.

## 5.4 Venue record

A venue record is displayed by clicking on a venue name in the list of venues (5.3).

### 5.4.1 To create a new venue record

Click **Add new venue** from the list of venues or an existing venue record.

All fields in a venue record are optional except the venue name.

**Private address** should be ticked if the venue is a private residence or somewhere else for which the details should not be displayed in publicity (such as in on-line group information). **Accessible** may be ticked to indicate that the venue is fully accessible.

Buttons next to the **Postcode**, **E-mail** and **Website** fields may be used to view a map of the address, send an e-mail or display the venue's website, respectively.

Press **Save record** to commit changes to the record, **Delete** to remove the venue.

## 5.5 Faculties

Faculties may be used to group together similar groups. The list of current faculties is displayed by clicking **Faculties** on the Home Page.

The only information specified for a faculty is the faculty name.

### 5.5.1 To add a new faculty

Enter the faculty name under **Add new faculty** and press **Save**.

### 5.5.2 To edit a faculty

Click **edit** next to the faculty name. Make the change required and press the adjacent **Save** button.

### 5.5.3 To remove a faculty

Click **remove** next to the faculty name.

## 5.6 Calendar

The calendar is a chronological list of meetings and events. All group events are incorporated automatically into the calendar. In addition, it is possible to add general or open meetings.

The calendar shows events between the displayed dates, which defaults to the next 3 months. You may change the dates as you wish.

At the top of the calendar you can choose to **Show all** events between the displayed dates, only those events for groups of which an individual is a **member** (select their name from the drop-down list) or only those events that take place at a selected venue.

By ticking **Show detail**, you will also see additional detail for events where this is available.

You may go directly to the event record (perhaps to edit it) by clicking the event's date/time in the list. You may go to the group record by clicking the group name. You may go to the venue record by clicking the venue name.

Where a venue's postcode is known, a **map** link will display a map of the location.

### **5.6.1 To download the calendar**

Click **Download PDF** at the bottom of the calendar to download the displayed events.

### **5.6.2 To view or add open meetings**

Click **Open Meetings** at the top of the page. A list of open meetings is displayed with a layout similar to that for group meetings (see 5.2.2). You may add, edit and remove meetings in the same way as for group meetings.

## 6 Financial operations

### Financial ledger

Beacon's financial ledger is a collection of transactions showing all monies received or paid in any of the U3A's bank accounts. All transactions are assigned to one or more financial categories in order to group together similar expenditure and income for analysis and reporting. The account/category design of the ledger inherently ensures robust bookkeeping practice that avoids discrepancies (except in relation to incorrect data entered by the user).

The **Ledger** may be displayed **by account**, **by category** or **by group**. Select the appropriate option on the Home Page.

- **Ledger by group** shows all transactions within the main ledger that have been associated with a group. You may select to show the transactions for one or all groups.

This option does *not* show the content of the separate group ledgers.

All options produce a similar listing. The **Account**, **Category** or **Group** is selected at the top of the page together with the financial Year. By default, the current year is shown.

#### 6.1.1 To view a transaction record

Click on the **Transaction** number on the left side of the ledger. The Transaction record is displayed.

#### 6.1.2 To view a member's record

Where a transaction is associated with a member, the **Membership No** is displayed. Clicking on this will take you to the corresponding Member Record (see 4.2).

#### 6.1.3 To download a spreadsheet of the displayed ledger

Press **Download Excel** at the foot of the list.

#### 6.1.4 To download a pdf file of the displayed ledger

Press **Download PDF** at the foot of the list.

#### 6.1.5 To update the brought forward

When the financial year rolls over, a brought forward for each account is calculated automatically by Beacon. However, it may happen that by the end of a financial year not all of last year's transactions will have been entered, or it may be necessary subsequently to change one or more transactions. To update the brought forward amount, press **Update B/F** at the top of the ledger by account.

*Note:* this button is only present when the current year's ledger is displayed. It is not possible to change the brought forward to any year except the present. Also the function operates only on the currently displayed account. To update other accounts, they must be displayed individually and updated.

## 6.2 Transaction record

You may display a transaction record from a ledger and from certain other places where transaction numbers are displayed by clicking on the transaction number.

### 6.2.1 To add a new transaction

Click **Add transaction** on the Home Page or the ledger.

**IMPORTANT: Transactions should not be entered directly for membership applications or renewals.  
Use the specific links on the Home Page for these operations.**

At the top of a transaction you must choose whether it refers to **Money received** or a **payment**. Enter the person (or body) **From** whom the money has been received or **To** whom it has been paid. Then enter the **Amount**.

- The amount should always be a positive figure.

Select the **Date** and enter a **Cheque No** or **Payment Method**. The latter is optional. Typical payment methods might be Cash, BACS, SO (standing order). On-line is shown for automatic PayPal payments.

**Detail** should give a concise reason for the payment. The **Cleared** field (if present) is set by the system when reconciliation takes place.

If the transaction is associated with a member (1 or 2) or a group, selected the names at the bottom of the form.

On the right side is a list of defined financial **Categories**. You must assign the money paid or received to one or more categories such that the total of the categories equals the **Amount** field. You will not be able to save the transaction if this is not the case. Normally categories should be entered as positive amounts for a payment or receipt. However, PayPal commission is shown as a negative amount (as it is deducted from the positive membership fee pre-receipt by the U3A) and this is correct.

When all is complete, press **Save** to commit the transaction. If you press **Save & Add Another**, a new transaction will be shown to enable a succession of transactions to be entered efficiently. Otherwise the saved transaction is redisplayed as confirmation.

### 6.2.2 To delete a transaction

Ordinarily, for reasons of financial integrity, transactions should *not* be deleted. Instead a new transaction should be added that negates the original (a payment for a receipt and vice-versa). However, if a genuine mistake has been made that is recognised straight away (a transaction being entered twice, for example) it may be deleted by pressing **Delete**. Note that all changes to data throughout Beacon are audited.

Transactions that have been cleared cannot be deleted.

## 6.3 Transferring money between accounts

It is sometimes necessary to transfer money between accounts. A common example for U3As with PayPal enabled will be to transfer funds from the PayPal account to their current account.



Select **Transfer money** from the Home Page or a ledger. This displays a simplified transaction form. Select or enter all fields, although Notes is optional. Press **Save** to commit.

## 6.4 Credit batches

When several cheques are paid into a bank at the same time, it is usual for a bank statement to record only the total amount, not each individual cheque. This can make it difficult to reconcile the statement against individual transactions.

Credit batches are a facility to make reconciliation simpler. All cheques paid in at one time are assigned to a credit batch and the batch appears in the reconciliation listing. When the bank statement entry is reconciled against the credit batch, the component transactions are reconciled automatically.

Select **Credit batches** from the Home Page or a ledger. A list will be shown of all credit batches that are **Uncleared** (not yet reconciled). Alternatively, all batches **Since** a selected date may be viewed. The **Account** may also be changed.

### 6.4.1 To view a transaction

Click on the **Transaction Ref**. The transaction record will be displayed (see 6.2).

### 6.4.2 To create a new credit batch

Click on **Add credit batch**. (This may also be done directly from a ledger)

A list is displayed of all outstanding payments for the selected Account. Select the ones to be paid into a bank by ticking the corresponding checkboxes. Press **Create Batch** at the foot of the list. An **Optional reference** may be given to the batch.

## 6.5 Reconcile account

Reconciliation is the process of ensuring that Beacon's ledger and your bank statements are synchronised, enabling any discrepancies to be identified.

Select **Reconcile account** from the Home Page or a ledger.

Select the **Account** to be reconciled, enter the bank **Statement End Balance** and select the **Statement End Date**. Press **Show**.

A list of all uncleared (unreconciled) transactions for the account will be shown together with the **Balance Difference** between Beacon and the bank statement at the top of the list. The aim of reconciliation is to reduce the balance difference to zero.

### 6.5.1 To reconcile the account

Go through the bank statement in order and identify matching entries in the reconciliation list. Tick the **Cleared** checkbox for each entry that agrees.

When complete, press **Reconcile Account** at the bottom of the list.

## 6.6 Financial statement

Click **Financial statement** on the Home Page to download a balance sheet of accounts and categories.

Select the financial **Year**. Indicate whether you want the **previous year's** statement to be included for comparison and whether or not a current membership count should be included. The membership count option is only available for a report of the current financial year and the figures given will relate to the current day.

Press **Download** to proceed with the statement.

## 6.7 Groups statement

Click **Groups statement** on the Home Page to show a summary of every group's accounts (as held in the group ledgers - see 5.2) between the dates selected at the top (which defaults to the current financial year).

To show individual transactions between the selected dates, tick **Show transactions**.

### 6.7.1 To download the statement

Press **Download Excel** at the bottom of the statement. The statement will be downloaded in the format (with or without transactions) selected.

## 6.8 Gift Aid

As charities, U3As are eligible to claim Gift Aid relief on membership subscriptions and donations but only under tightly prescribed circumstances laid down by HM Revenue & Customs. As the operation of U3As differ greatly from one to another, it is not possible to generalise about whether or not any U3A may claim relief.

Beacon's approach is to determine the income that could be put forward for Gift Aid relief according to the rules of HMRC, *on the assumption that the user U3A is eligible to make such claims in the first place*. Responsibility for deciding whether or not Gift Aid claims should be made rests entirely with the U3A.

Under System Settings (see 7.3), there is a checkbox labelled **Tick to enable Gift Aid operation**. Each U3A must decide whether or not to tick this checkbox and be responsible for the consequences of doing so. If the checkbox is ticked, Beacon will determine the income that can be submitted to HMRC for Gift Aid relief. If the checkbox is not ticked, all Gift Aid functionality within Beacon will be turned off (although the Member Records will still record whether a member is eligible for Gift Aid claims).

### 6.8.1 Determination of income eligible for Gift Aid claims

Beacon follows strictly the HMRC rules in deciding how much of a membership subscription or donation may be declared for Gift Aid relief.

Ordinarily, Gift Aid relief may be claimed from that part of a membership payment that relates to the payer alone and only if the payer meets the rules for paying tax (the Gift Aid field in the member record is set).

However, if a member and his/her partner both belong to a membership class with the Joint or Family attribute set (see 7.7), then relief may be claimed on the full joint membership payment if the payer alone meets the rules for paying tax.

Thus to maximise their Gift Aid relief, U3As should have Joint or Family membership classes in addition to those for individuals. The membership fee

corresponding to a non-tax paying partner cannot otherwise be declared for Gift Aid relief.

### 6.8.2 Downloading a Gift Aid declaration

To download a Gift Aid declaration, select **Gift Aid declaration** on the Home Page. This option is present only if Gift Aid operation is enabled.

By default, the current financial year is shown and excluded are payments for which a declaration has previously been made.

To download a declaration spreadsheet, select the payments to be included by ticking the **Select** column (by default all payments are ticked) and press **Download Excel**.

After downloading, you will be asked **Mark transactions as claimed?** If you press **Mark**, a Claimed date will be added to each transaction and they will not appear again in a Gift Aid declaration.

- Although the spreadsheet format is correct for submission to HMRC, it is without the required header rows. Therefore the contents must be copied and pasted into the official spreadsheet. It is intended to eliminate this step in a future update.

## 6.9 Working with PayPal

To accept payment on-line for members joining or renewing their membership, your U3A will need to set up its own PayPal account and register as a charity with PayPal. Information about doing this is available in a separate information sheet. In 2015 the reduced charity commission rate was 1.4% + 20p; e.g. on a membership fee of £13.50 you pay 39p commission.

Beacon makes a direct connection with PayPal using the email address of your PayPal account. You enter this address into System Settings when you set up PayPal. When someone pays using PayPal with the online application or renewal form, the amount they have paid is transmitted to Beacon automatically. The amount is divided between that available to the U3A in its PayPal account and that retained by PayPal as commission.

The net amount is posted to Beacon's PayPal Account, which should reflect the balance on your account with PayPal. The gross amount is categorised as membership income and the negative commission as a separate financial category. You will see the total PayPal commission paid in your Statement of Accounts.

From time to time your treasurer should transfer money from your account with PayPal to your bank account. A minimum of £50 should be transferred each time to avoid additional PayPal fees. This transfer must be reflected in the Beacon system using the "Transfer Money" facility to transfer the same amount between Beacon's PayPal and current accounts.

Note that the Beacon System does not have access to or store any card details or other financial information. These are all handled exclusively by PayPal.

The information provided to PayPal should match that of a member's bank account (including address, county and postcode). If payment is refused by PayPal, the member should make enquiries of their bank.

## 7 Set-up operations

These operations establish the working environment of Beacon for your U3A. Most options will not need to be changed often, if at all, although all will need to be confirmed for a new installation.

- There are other configuration options for your site that can only be changed by the national system managers. You should apply to them if you think a change is needed. These options include the starting date for the financial and membership years, PayPal enablement, custom membership fields and terminology aliases.

### 7.1 System users

Click **System users** on the Home Page.

A list is displayed of all the people who are allowed to access Beacon within your U3A. You should ensure that where access is no longer required, users are removed.

- Members who are not current are highlighted in red in the list of users and action should be taken to remove them if they do not renew.

Click on a name to enter the user's record.

At the top is shown the member who is the same person as the user together with their log-in name. Pressing the button next to the member's name will take you to their Member Record.

- All users (except the special case of the Site Administrator) must be current U3A members. However, users and members are not synonymous. Only those members assigned as users may access Beacon.
- Site Administrators who are not also selected as U3A members must provide an e-mail address. If this is not done, they will not be able to send e-mails.

Press **Save user** to commit changes to these fields. Press **Delete user** to remove a user.

#### 7.1.1 To add a new user

Click **Add New User** from the users' list or an existing User Record. New users are automatically assigned a temporary password but must be assigned to a role.

#### 7.1.2 To set a user's password

It is not possible to ascertain a user's password, so if a user forgets it the only option is to reset the password. Users can do this themselves if they can satisfactorily identify themselves (see 8.4) and so can a user administrator. To reset a user's password, press **Set Temporary Password**. The user will have to change their password again on first use.

#### 7.1.3 To assign a user to roles

Every user must be assigned to one or more roles in order to access Beacon. Select the roles required at the bottom of the User Record and press **Save Role Assignment**.

## 7.2 Roles and privileges

Roles are the means by which privileges are assigned to users. Privileges determine which parts of Beacon a user may access and the tasks they may carry out.

Roles should be considered as being equivalent to 'jobs', whereas users are people. When the person carrying out a particular job changes, a new user will need to be assigned to the role but the role itself should not normally need to be changed. Furthermore, while many roles will only be undertaken at any one time by one person, other roles may be assigned to many people (group leaders, for example). All the users assigned to the same role will have the same privileges, but their activities in using Beacon will be audited individually.

To display a list of roles, click **Roles and privileges** from the Home Page. From here you may click on any role name to access the Role Record.

A **Role Record** comprises the role name, optional notes and a checkbox to indicate whether the role holder is a member of the U3A committee. Press **Save Role** to commit changes and **Delete role** to remove a role from the system.

### 7.2.1 To add a new role

Click **Add Role** from the list of roles or an existing role record.

### 7.2.2 To assign privileges to a role

Under **Privileges** assign the privileges required for the role. For good security, always assign the minimum privileges necessary to carry out the functions of the role.

- Clicking on a row or column header will toggle all privileges in that row/column.

To remove privileges, simply untick the corresponding checkboxes.

Press **Save Privileges** to commit the assignment made.

- Privileges refer to distinct parts of Beacon and are subdivided, as applicable, with separate access rights for viewing, creating new records, changing existing records and deleting records. Note that the privilege to view will be required for anyone who needs to create, change or delete a record.
- Roles that only have viewing privileges will not be able to make any changes to data for the corresponding operations.
- Separate privileges are assigned to operations such as downloading documents, sending e-mails, etc. Users will not be able to send e-mails from any part of Beacon if their roles are not assigned the Email: Send privilege.
- Most of the operations to which privileges are assigned should be self-explanatory, but others may be less so.
- Group operations sometimes apply separately to 'all', 'as leader' and 'as member'. Roles that are assigned 'all' privileges can access the records for all groups. Those assigned 'as leader' can only access the groups of which the user is a leader. Those assigned 'as member' can only access the groups of which the user is an individual member.

- Operations such as 'Member classes' refer to setting up membership classes, not the selection of classes in member records, for example. Operation names often correspond to similar names on the Home Page.

## 7.3 System settings

Click **System settings** on the Home Page.

Here are set various parameters for the operation of Beacon.

If you change the option to **E-mail membership cards**, you should also change the system messages (see 7.4) that are sent when people join or renew on-line to reflect the fact that there is, or isn't, a membership card attached.

It is important that the correct mode of operation for **Membership fees** is chosen together with the **Advance renewals** and **grace** periods if membership renewals are to operate correctly.

Each U3A must decide whether or not to **Enable Gift Aid operation**. See 6.8.

The default town, county and STD code fields provide defaults (if required) for new membership records. They can be overridden at the time of creating a new record. If a default STD code is left in place without the addition of the telephone number, it is automatically removed upon saving.

Press **Update** to commit changes to system settings.

## 7.4 System messages

These are generated automatically by Beacon but may be customised. Examples are the e-mails sent to members when they join or renew on-line.

Select **System messages** on the Home Page.

**Home page notices** are displayed at the bottom of the Home Page and may be used to communicate to users when they log-in. Clear the message to remove.

Tokens (on the right side) and links (at the bottom) may be included in messages in a similar way to their use in e-mails (see 4.10).

Press **Update** to save changes to system messages.

## 7.5 Finance accounts

Click **Finance accounts** on the Home Page to create or edit accounts. Finance accounts should correspond one-to-one with bank accounts (including PayPal).

### 7.5.1 To add a new account

Enter the account name under **Add new account** and press **Save**.

### 7.5.2 To change an account name

Click **edit** next to the account name. Alter the name and press the adjacent **Save** button to commit.

### 7.5.3 To change whether an account is current

Tick or untick the **Active** checkbox for the account. Inactive accounts do not appear in the current ledger.

#### 7.5.4 To remove an account

Click **delete** next to the account name. You will not be allowed to delete an account if there are transactions recorded against it. In which case, consider making it non-current instead.

- Some accounts are locked. You are not allowed to change these.

### 7.6 Finance categories

Click **Finance categories** on the Home Page to create or edit categories.

#### 7.6.1 To add a new category

Enter the category name under **Add new category** and press **Save**.

#### 7.6.2 To change a category name

Click **edit** next to the category name. Alter the name and press the adjacent **Save** button to commit.

#### 7.6.3 To change whether a category is current

Tick or untick the **Active** checkbox for the category. Inactive categories do not appear in new transactions.

#### 7.6.4 To remove a category

Click **delete** next to the category name. You will not be allowed to delete a category if there are transactions recorded against it. In which case, consider making it non-current instead.

- Some categories are locked. You are not allowed to change these.

### 7.7 Membership classes

Membership classes are the means of determining the fee to be paid for membership. They can also have consequences for the claiming of Gift Aid (see 6.8).

Select **Membership classes** from the Home Page.

A list of current classes is shown. Click on the class name to edit the Class Record.

#### 7.7.1 To create a new membership class

Click **Add New Membership Class** from the list of classes or an existing Class Record.

**Current** indicates that the class may be used for new memberships.

The **Explanation** field will appear on-line to inform potential members as to what class of membership they should choose. The explanation should be clear but concise.

For each class you should consider whether to tick one or both of the following options which will determine how Beacon processes memberships:

- 1 of 2 people at same address (meeting the HMRC requirements of Family membership – see 6.8)
- Full member of another U3A



To save changes to a Class Record, press **Save Record**.

To delete a record, press **Delete Record**. Some class records are locked against deletion.

### 7.7.2 To assign membership fees to a class

The Class Record differs according to the **Membership Fees** option selected under **System settings** (see 7.3).

If fees are **rolling** or **same fees all year**, a single **Fee per person** field is included in the main Class Record. Enter the fee and save as above.

If fees can **vary by month of joining**, a panel is shown below the main Class Record with one field for each month of the year (starting with the configured membership start month) plus another for renewals. You must complete all fields before pressing **Save Fees** to commit;

If you enter the fees from left to right and **Auto-propagate** is ticked, then the fee you enter will be copied automatically to succeeding months. In this way you will only need to alter the fee in the month(s) when it changes.

|  |
|--|
| <p><b>IMPORTANT:</b> All membership fees must be <b>per person</b>, even for a Joint membership.</p> |
|--|

## 7.8 Member statuses

Click **Member statuses** on the Home Page to create new statuses.

**Current** and **Lapsed** are mandatory statuses and cannot be changed. Some U3As find it useful to have additional statuses such as Resigned and Deceased to ensure that communications no longer go to these people during the period when their membership records must be retained to meet HMRC requirements.

### 7.8.1 To add a new status

Enter the status name under **Add new status** and press **Save**.

### 7.8.2 To change a status name

Click **edit** next to the status name. Alter the name and press the adjacent **Save** button to commit.

### 7.8.3 To remove a status

Click **delete** next to the status name.

## 7.9 Poll

Polls are a way of grouping members by some particular characteristic. Members may be assigned to one or more polls and the polls used as filters in various scenarios. Each poll comprises only a poll name.

Click **Poll** on the Home Page to display a list of all current polls.

### 7.9.1 To add a new poll

Enter a name beside **Add new poll** and press **Save**.

### **7.9.2 To change a poll name**

Click **edit** next to the poll name. Change the name and press the adjacent **Save** button.

### **7.9.3 To remove a poll**

Click **delete** next to the poll name.

### **7.9.4 To clear all assignments**

To clear the assignment of all members from a poll, click **Clear all assignments** next to the poll name.

## 8 Miscellaneous options

### 8.1 Personal preferences

Click **Personal preferences** on the Home Page. The preferences set here apply to the current computer or current user only.

#### 8.1.1 Drop-down name lists & Timeout

The appearance and sort order of drop-down lists may be changed to suit personal preference.

- It can be an advantage to show the surname first as it allows any given surname to be located quickly by typing its first letter while the list has focus. The list then jumps to the first surname starting with this letter.

This choice does not apply to other types of list.

When Beacon has been inactive for a period of time, you are required to login again. This is an important security precaution to reduce the likelihood of someone else using your computer after you have logged in and then left the machine.

By default, Beacon times out after 20 minutes and you should not make the delay longer on a shared machine (it would be better to reduce it). However, if you find this period inconvenient on a computer to which no-one else has access, you may change the **Session timeout** duration here.

Press **Save Name Lists & Timeout** to save these settings which applies to any user of the current computer. Local settings must be enabled at log-in.

#### 8.1.2 Change password

To change the current user's password, enter a **New password** and then **Confirm**. Follow the guidance given about password requirements. Press **Change Password** to bring the new password into effect.

#### 8.1.3 Change personal Q&A

The current user can change their personal question and answer which may be used to verify the identity of the user. You can accept the default **Question** or change it to something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else. Press **Update Q&A** to store the new phrases.

### 8.2 Audit log

The audit log records all actions by any user that change data and certain other actions too. The format is technically-orientated to assist support personnel, but users may find it useful to look at the audit log if something has not gone as expected.

Click **Audit log** on the Home Page.

### 8.3 U3A officers

This option allows you to record details of all your U3A offices and their current postholders. You may associate with each office a non-personal office e-mail address (such as treasurer@myu3a.org.uk) and you may send e-mails to one or more officers through this page.

Click **U3A officers** under Misc on the Home Page.

### 8.3.1 To add a new office

Enter details in the controls at the bottom of the table. Select a postholder from the list of current members. If an office does not have a non-personal e-mail address, you may enter a personal address but this will not be entered automatically. Press **Save**.

### 8.3.2 To change details for an office

Click on **edit** to the right of the office name. The row will change to editable controls. Make the changes you require and press **Save** at the end of the same row.

### 8.3.3 To delete an office

Click on **delete** to the right of the office name. You will be required to confirm deletion.

### 8.3.4 To send an e-mail

Select the offices to which you wish to send an e-mail using the checkboxes in the **Select** column. Alternatively, click on the **Select** column header to toggle all the checkboxes on or off. Press **Send E-mail**. The **Send E-mail** page is displayed (see 4.10).

## 8.4 Public links

Select **Public links** from the Home Page.

The URLs (web addresses) shown may be incorporated into a U3A's public website to give access to on-line services. Membership services require PayPal to be enabled.

When using a URL, make sure that the entire link is included.

The options visible to members or the public are configured on this page.

See section 9 for more information about on-line services.

## 8.5 Data export and backup

This facility is provided to allow U3As to download their data for use in external applications, reporting tools, etc and also so that they can keep backups of their own data locally if they wish to do so. Although Beacon data is backed up daily on the server, it is a good idea to have local backups as well.

Select **Data export & backup** from the Home Page.

Data can be downloaded in either of two formats: Excel or CSV. Select the option you require near the top of the page.

According to the format you select, a different list of downloads will be displayed. You can download the same data in either format, but whereas Excel can contain related data on different worksheets within the same spreadsheet, CSV files can only contain one kind of data. There are therefore more options when selecting CSV.

There is, however, one additional option under Excel: **Backup all data**. If this is selected, all the data that can be downloaded individually by the other

options will be downloaded as a single spreadsheet. This is therefore the best option for backing up all data.

Click on the download you require. You will be asked where to save the file and the download will then take place.

## 8.6 Recovering a forgotten username or password

If you have forgotten your username or password, you may be able to recover it. Use the **Click here** link on the log-in page and complete the requested information. Then press **Submit**.

If you are able to be identified, you will then be asked the answer to your personal question. Make sure that you type this in the same format as when it was originally set.

If your answer is correct, you will be sent an e-mail with your username and a new temporary password, which will need to be changed at first log-in.

If this procedure fails, seek the assistance of your site administrator who can supply the information to you.

- You cannot recover a password for a site administrator by this means. If you cannot log in as a site administrator, you must contact the national Beacon support team to reset your password.

## 8.7 Temporary passwords

All users are initially assigned temporary passwords. A temporary password is also assigned if your password has to be reset for any reason. Temporary passwords must be changed at first log-in. In this way no-one should know your password except yourself. Keep it somewhere safe but well disguised so that it cannot be accessed by anyone else.

After logging in with a temporary password, the **Password Change** page is shown.

Enter a **New Password** and **Confirm** by entering it again. Abide by the guidance given as to the requirements for passwords.

Then enter a **personal question and answer**. You may answer the default question or you may replace this with something else. Make sure that the **Answer** is something that you will remember (including the format) but which is unlikely to be known to anyone else.

Press **Submit** to commit your new password and Q&A.

## 9 On-line services

These services are available for access by members or other people via your public U3A website. Click **Public links** on the Home Page to see the URLs (web addresses) that must be embedded in your website in order to access these services (see 8.4). You should accompany these links with some explanation of their purpose.

### 9.1 New member applications

This service requires PayPal to be enabled.

The format is similar to when adding a new member manually (see 4.3). However, instead of entering an amount already received, the user presses **Make Payment** and is taken to PayPal to make their payment there. If the payment is confirmed, PayPal notifies Beacon and the new membership and financial transaction are entered into the Beacon database.

There is no need for U3A officers to take any action to confirm new on-line members. However, the members who have joined may be viewed under **Recent members** (see 4.5) and the transactions in the ledger.

When U3As create links from their website to on-line services, they should make it clear that the link for New Member Applications should not be used by members renewing. Renewals should be carried out only through the Members Portal. A message is displayed when New Member Applications is launched to confirm this.

### 9.2 Members Portal

This is a gateway to on-line services for existing members. They will need to identify themselves to enter, with their name, membership number, postcode and e-mail address.

Which options appear can be configured under **Public Links** from the Home Page.

#### 9.2.1 Membership renewals

This service requires PayPal to be enabled and the option will only appear if the member's renewal is due (in or beyond the advance renewals period).

Members can only renew with the same membership class as previously. Joint members must renew for both partners at the same time. Renewals involving any change of membership class cannot be made on-line. However, two people with individual (not joint) membership who share an address may choose to renew one or both members at the same time (assuming that renewals are due for both).

When the user presses **Make Payment**, they are taken to PayPal to make their payment. If the payment is confirmed, PayPal notifies Beacon and the membership is renewed.

- If members wish to change their membership class or if their personal details used for verification have changed, they cannot renew on-line.
- If a member has already renewed for the current year (or the following year if within the configured advance renewals period), they are informed of this and the procedure terminated.

## 9.2.2 Groups list

This option shows all current groups. By clicking on the arrowhead to the left of any group, the information about the group is expanded. This can include when the group meets; venue; contact; and general details. Which fields are displayed can be configured through **Public Links** from the Home Page.

The list may be downloaded as a pdf document by pressing the **Download** button at the bottom of the page. (This option is also configurable)

## 9.2.3 Calendar of meetings and events

Radio buttons at the top of the page enable the following options to be shown:

- All future meetings and events
- All future meetings and events for a specified group
- All future meetings and events for group to which the member belongs, plus open meetings.

By clicking on the arrowhead to the left of any event, the information about it is expanded. This can include the venue; contact for enquires; and general event details. Which fields are displayed can be configured through Public Links from the Home Page.

## 9.2.4 Change personal details

This option allows members to change most of their personal details: address, telephone number, e-mail, etc. It also includes a Personal Question and Answer which, if provided, will be used to further enhance login security.

Pressing **Update Personal Details** commits changes made. An e-mail is sent to the member (at both old and new e-mail addresses if this has been changed) to confirm that changes have been made.

## 9.3 Public groups list

This link is provided for public access. The information shown is similar to the groups list in the Members Portal (9.2.2) but the fields that are displayed are configured separately, allowing less information to be shown to the public than to members.

## 9.4 Public calendar

This link is provided for public access. It is similar to the calendar in the Members Portal (9.2.3) but the fields that are displayed are configured separately, allowing less information to be shown to the public than to members. Unlike in the Members Portal, the public list cannot be personalised.

*Note:* It is possible to inhibit the display of any particular meeting or event in the public calendar.

## 10 U3A Beacon Users' Forum

The Beacon Users' Forum has been provided to support people using Beacon and to allow users to give feedback about possible bugs, usability issues and suggestions for new features.

The Forum is a peer-to-peer resource to enable users to help one another. It is monitored from time to time by the Beacon Development Team who may respond to unresolved issues. They will also take the feedback into account when deciding upon future changes.

### 10.1 Registering to use the Forum

Registration for the Forum is quite separate from the administration of Beacon itself. You may access the Forum at

<https://demo.u3abeacon.org.uk/index.php>

or use the link from the Beacon Home Page.

- Your browser may display a certificate error notice the first time that you connect to this URL. It is safe to proceed. If you accept the offer to register the certificate, you will not receive the error notice again on the same computer. In the near future we will cure this error.

To register as a new Forum user, use the **Need to register?** link towards the bottom right corner of the Forum log-in page. You will be sent an e-mail with details of how to confirm your registration and this must be done before you can post to the Forum threads.

### 10.2 Using the Forum

When you log-in, you will see a list of current forums. Note that one forum is specifically for the use of U3As with live sites while another is for the use of people using the Beacon Demo System. The other forums can be used by anyone.

Click on the forum you wish to enter to see a list of the threads (a related series of messages) that are already present. Search the list to see if someone else has already created a thread relating to your enquiry. You can scroll through or use the 'Search this Forum' box on the right side near the bottom of the page. You should add to an existing thread where possible so that all related postings are grouped together as a single resource and so that you gain from the experiences already posted. Your query may already have been answered!

To add to an existing thread, use the Quick Reply box at the bottom or press a New Reply button (on the right side). When you have completed your entry, press Update Post at the bottom.

To create a new thread, press Post Thread from the list of threads. There are two black buttons on the right side. When you have completed your entry, press Post Thread at the bottom.

When you create a Subject for a new thread, please give a succinct summary of the topic so that it will be meaningful to anyone else with a similar query.

Just above the Update Post or Post Thread buttons there are four radio buttons labelled 'Thread Subscription'. Select 'Subscribe and receive email notification of new replies' in order to be advised when someone responds to



your message. If you don't do this, you will have to keep coming back to the forum to see if anyone has replied.

The forums are moderated. Inappropriate postings will be removed and others may be edited (especially the Subject) or moved to make them more useful to other people.

### **10.3 Keep up to date**

Each time you come to the forum, click on View New Posts near the top of the page to see what's been added since you last visited.

To get back to the list of forums at any time, click on the 'U3A Beacon Users' Forum' link which is a little below the MyBB page heading.

For more help in using the forum, press the Help link in the top right corner of any page.

## Appendix A Recommendations for all Beacon users sending email

1. Minimise the frequency of sending emails to similar large lists (over 50) of recipients. It is better to delay until you have more information to put into a single email.
2. Avoid sending emails that the majority of recipients won't bother to open. It encourages the system to assume that messages from the sender are spam.
3. If you are sending an email to a large number of people, say over 50, please accept that your email will be processed by spam filters in the same way as mass marketing emails. Therefore you should follow the following industry guidelines for such mail.
  - i. Avoid or minimise sending attachments when sending an email to large lists of recipients. It is tempting to do so, as Beacon and SendGrid enable you to do so, but it is recommended instead to put the files on to your website and to provide a weblink to let the user download the file if they want. You can alternatively use services such as Dropbox
  - ii. When putting a link (URL) into an email, do NOT use the URL itself as the clickable visible text. Instead use some descriptive English text. Note that this is the opposite of Beacon's previous guidance and is due to the way SendGrid handles links, and you may need to change some of your standard email messages
  - iii. Maximum organisation visibility helps as well. Including your physical mailing address and phone number in your email footers helps mail providers recognize you as a legitimate organisation and sender of email. This also helps your recipients know that this message is indeed from you!
  - iv. Provide an explicit way for the recipient to unsubscribe from getting emails from you, even though you know they have said they want such emails. For example at the bottom of your email:

"To unsubscribe from these mails email Memsec@yourU3A with subject unsubscribe from emails"

The Beacon team will look to see if we can automate adding such a message to your email in future.