

Group Leader Beacon Quick Start Guide 2025

Hardware requirements

Whilst Beacon operates reasonably on a tablet or smart phone, a Windows PC or laptop is recommended.

Initial login

Beacon Group Leaders and Officers login (also referred to as System User login) is available from the following link: [Beacon System User Access](#). That link is also on the Chard, Ilminster and District (CID) u3a website [Beacon Page](#). The username and temporary password have been advised to you separately. The latter requires change at first login.

Groups page

From the Beacon home page, clicking **Groups** reaches the Groups page. This shows ONLY the Active groups. If **Show active only** box is *unticked*, then ALL groups are visible. A group leader may only amend those groups of which he/she is a leader, shown in **blue** on the Groups page. To access a group record, the relevant group name is clicked.

Group record

Having accessed the group record, there are the following possibilities: Details, Schedule, Members and Ledger.

Details allows maintenance of general information about a group.

Schedule allows recording of future dates and times of meetings, visible from the website in the Public Calendar.

Members allows adding, removing and emailing members of a group. To email all members, *Select* is clicked followed by **Select All**. Alternatively, selection of specific members is achieved by ticking the relevant boxes. Having selected the desired members, **Do with selected** is clicked near the foot of the page. The **Send Email** page is used to compose and send an email to the relevant members and is reasonably intuitive to use. Further details are given below.

Ledger is a simple system to keep track of payments and receipts relating to the group. The treasurer maintains the ledgers but group leaders can view the ledger(s) relating to their group(s) to check the financial position.

Email composition hints

1. The tokens shown on the right of the email composition page are used to personalise a message. For example, **Hi #FAM** is often used to begin an email. When the email is sent to the group members, the token #FAM is replaced in each individual email by the relevant member's familiar name (or forename if no familiar name).
2. Test the email facility by sending a message to yourself. No ill-effects can occur!
3. Tick the *Tick to receive copy* box if a copy of your email is required.
4. Whilst attachments may be made using the **Choose files** button, there is no provision to embed photos.
5. From the Beacon home page, **E-mail Delivery** may be used to check that emails sent have been delivered successfully to the recipient's mailbox.

Email protocol for Group Leaders

Emails to multiple group members should be **sent via Beacon only**. Beacon stores members' data securely and always sends message as "bcc". Thus group leaders' personal email clients (gmail, outlook etc) should not be used for emails to multiple group members as data protection laws may be breached accidentally by so doing.

Group Leader responsibilities with Beacon

A group leader is required to ensure all participants in their group are current u3a members. There are insurance issues if this is not the case. Beacon highlights a lapsed member in **red** in the group members list. Please ensure the details recorded for your group are kept up to date. The information therein appears on the [Public Calendar](#) and [Groups List](#) which are available to all u3a members and the general public via our [CID u3a website](#), therefore it is important the details are correct. The Beacon information provided is valuable in assisting the Group Co-ordinator, Membership Secretary and Newsletter Editor with their tasks.

Help and training

There is a detailed [Beacon User Guide](#) and training is available if required on a one-to-one basis.