

Beacon u3a Management System

Group Leaders' User Guide (Cheltenham)

1 Introduction

Beacon is an on-line management system for u3a local associations. It handles the administrative tasks of membership enrolment, subscription and renewals. It also handles the finance records and provides facilities for managing groups. It was developed by u3a members¹ but is now maintained by an outside company who act under the direction of the Third Age Trust and u3a Beacon Team.

These instructions are for Group Leaders and are tailored to Cheltenham u3a.

2 Access

Beacon is located at: <https://u3abeacon.org.uk>

It is accessed by username and password, allocated by the Beacon Administrator for Cheltenham u3a. (beacon@cheltenhamu3a.org.uk). This is separate from the access through the website for member renewals.

Upon launching the system, the following log-in screen is displayed.

Select Cheltenham as the u3a from the drop-down list. Then enter the username and password you have been given and press or click **Enter**. Usernames and passwords are case-sensitive.

You are allowed four attempts to log-in. If the fourth attempt 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

¹ Cheltenham u3a member John Franklin played a major part in this u3a national initiative.

continue to be unable to log-in, seek the assistance of the Beacon Administrator who will confirm your username and may reset your password.

If this is your first login or if your password has been reset by the Beacon Administrator, 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 the security question and answer.

The first time you log in, and occasionally after that, the Cookie Control appears. It describes the optional cookies that your browser can store to remember a range of handy preferences for your next visit. The cookies used by Beacon are benign and you are advised to accept optional cookies unless you are using a public or shared computer.

3 Group Leader's Home Page

After log-in, you will find yourself in the Group Leaders home page which shows the Beacon functions available to group leaders. The sub-pages available from the home page are **Groups**, **Venues**, **Calendar**, **Ledger (by group)**, **E-mail delivery** and **Personal preferences**.

u3a Cheltenham Beacon

Administration

You are logged in as [Name] [Log Out](#)

Membership	Groups	Finance	Misc	Set up
	Groups	Ledger (by group)	E-mail delivery	
	Venues		Personal preferences	
	Calendar			

[u3a Beacon Users' Forum](#) [Beacon User Guide](#) [Beacon Website](#)

Hover mouse over captions for more information

System messages are shown here. They may not be relevant to Group Leaders.

Release notes
Whenever possible, release notes will be published, in advance, on the Beacon website: <https://beacon.u3a.org.uk/releases/release-notes/>

Monthly maintenance
Beacon maintenance is carried out on the first Tuesday of every month at 10:30am. Although there should be minimal impact on users, please avoid making changes at this time as you may lose unsaved work.

The **Groups** sub-page displays a list of all Cheltenham u3a groups (see below). **Venues** allows you to search the list of venues already used by Cheltenham groups. If you want to use a venue not on the list you can ask for it to be added. The Beacon **Calendar** facility is not used by Cheltenham u3a and will not be described here. The website gives a list of events and meeting days and times for groups”

Ledger by group allow you to view the financial information held for your group on the main finance ledger managed by the Treasurer. It will not be described further here.

Mail Delivery is described in 6 below and **Personal Preferences** in 7 below.

4 Cheltenham Groups

Clicking on **Groups** opens a page with the list of the Cheltenham groups. A sample list (not from Cheltenham) is shown below.

Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
▲ ▼	A							
<input type="checkbox"/>	Art Appreciation	Y	3rd Thursday at 1:00pm	The Feelgood Centre	Alan Abbey	1	12	
▲ ▼	B							
<input type="checkbox"/>	Bridge New	Y	Fortnightly on Wednesdays at 2:00pm	Private House	Walter Scott	13	12	1
▲ ▼	C							
<input type="checkbox"/>	Coffee and Cake	Y	1st Thursday at 10:30am	Costa High St	Mary Hawthorn	1	10	
<input type="checkbox"/>	Computing For Beginners	Y	1st Weds and 3rd Thurs at midday	Library	Nik Pevsner	1	10	
▲ ▼	F							
<input type="checkbox"/>	Family History	Y	2nd and 4th Mondays at 2:00pm	The Feelgood Centre	Angie Phillips	9	8	1
<input type="checkbox"/>	Folk Dancing	Y	Every Tuesday at 10:00am	St Saviours Hall	Percy Wainwright	1	24	
▲ ▼	M							
<input type="checkbox"/>	Map Reading	Y	2nd Wednesday at 9:00am	No Fixed Venue	Sylvia Testlady	1	40	
▲ ▼	R							
<input type="checkbox"/>	Railways and Canals	Y	1st Tuesday at 2:00pm	Private House	Mike Young	3	8	
▲ ▼	S							
<input type="checkbox"/>	Spanish	Y	1st and 3rd Fridays at 2:30pm	Corn Exchange	Attila Theeman	1	8	
▲ ▼	W							
<input type="checkbox"/>	Wine Tasting	Y	4th Wednesday at 7:00pm	Corn Exchange	Nicholas Hawksmoor	1	12	
Select	Group	Active	When	Where	Leaders	Members	Max	Waiting
<input type="button" value="Do with selected"/> <input type="button" value="Send E-mail to leaders"/>								
10 groups; 10 leaders (0 selected)								

If you are recognised as a Group Leader, your group(s) will be shown in blue as a clickable link. Clicking on this will open the group record.

5 Group Record

The group record is where you will carry out most of your group management activities. There are four sub-pages: **Details**, **Schedule**, **Members** and **Ledger**.

5.1 Details Sub-Page

The screenshot shows the 'Group Record for Drama (Wednesday)' sub-page. The page has a blue header with the title 'Group Record for Drama (Wednesday)' and a 'Sub Pages' button. Below the header are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Details' tab is active. The main content area is titled 'Group Details' and contains a form with the following fields and options:

- Group: Drama (Wednesday)
- Faculty: Art and Specialist
- Status: Active
- Max members: 16
- Allow members to join on-line:
- Allow members to leave on-line:
- Notify leader of changes:
- Enable waiting list:
- Display waiting list by default:
- Show addresses:
- When: First Wednesday of Each Month 1.30 pm to 3.30 pm
- Normal start time: 13:30
- End time: 15:30
- Enquiries: [Redacted]
- Venue: Playhouse Theatre
- Information: Wednesday from 1.30 to 3.30. We meet in the green room of the Cheltenham Playhouse on Bath Road. We rehearse small group and individual pieces with a view to performing for friends and families once or twice a year.
- Notes: [Empty text box]

At the bottom of the form, there are 'Save Record' and 'Delete' buttons. A timestamp at the bottom reads: 'Group record created 18 May 2025 12:35; last changed 27 Apr 2026 08:14'.

Your group will be allocated to a cluster, which is shown under the heading of **Faculty** and be shown with a **Status** of "Active". You can make it "Inactive", although you should advise your Cluster supporter before changing the status of a group.

Unless your group size is unlimited you should enter a number for the maximum numbers of members. You should also **Enable waiting list** so that anyone added manually in excess of that number will become a waiting member. You can choose whether to **Display waiting list by default**. See below for further information on waiting lists.

Cheltenham u3a has not implemented the facility to allow members to join a group online so if you tick the boxes **Allow members to join online**, **Allow members to leave online** or **Notify leader of changes**, it will have no effect.

You can enter a normal start time and a normal end time if you want. This may duplicate some of the information in the **When** box

You can select a venue from the dropdown list. If the meetings are in a private house, you can select "Private Address" from the drop-down list.

Contact can be a name, a telephone number or an email address but it is preferable to have a name.

The **Information** field can be used to describe the group and is downloadable. The **Notes** field is not picked up by any downloads, so you can use it for information you don't want to share with the members.

If you make any changes, click the **Save Record** button.

5.2 Group Schedule Sub-Page

This is where you can record scheduled events and meetings for your group. You may use it if you wish but it cannot be viewed by your group members and is not currently used by anybody else.

5.3 Group Members Sub-Page

This sub-page shows members of the group and provides a facility to add and remove members and carry out other actions.

The screenshot shows the 'Group Record for Bridge New' page. At the top, there are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. Below the tabs are three checkboxes: 'Joined members' (checked), 'Show the 1 Waiting member' (checked), and 'Show emergency contacts' (checked). The main content is a table titled 'Group Members' with columns: 'Select', 'Member No.', 'Name', 'Address', 'Telephone', 'Mobile', 'Status', 'Waiting', and actions. The table lists 11 members. Two red arrows point to specific members: one to member 1005 with the text 'This member has not renewed' and another to member 1076 with the text 'Member on waiting list'. Below the table is a 'Do with selected' button and a 'Send E-mail' dropdown menu. At the bottom, there is a section for 'Add member by membership number' with an input field and an 'Add' button.

Select	Member No.	Name	Address	Telephone	Mobile	Status	Waiting	
<input type="checkbox"/>	1005	David John Barrett	27 Lower Kirkgate, South Demoton, DM4 5TG	0123 456 9201	0747 456 1005	Current		remove - make leader
Emergency contact: Carolyn Barrett 0707 456 1029								
<input type="checkbox"/>	1006	Robert Barron	69 Anyname Road, Demoton, DM18 4DF	0123 456 1031	0707 456 1031	Current		remove - make leader
<input type="checkbox"/>	1076	John Gordon	44 Grafton Road, Demoton, DM8 5RE		07876 654123	Current	08-Jun-24	remove - join group
<input type="checkbox"/>	1022	Jennifer Johnson	51 Johnson Street, Demoton, DM18 4BB	0123 456 1140	0707 456 1140	Current		remove - make leader
Emergency contact: Jennifer Jones 0707 456 1150								
<input type="checkbox"/>	1050	Diane Miles	56 North Street, Worlds End Village, Nr Demoton, DM6 8TU	0123 456 1174	0707 456 1174	Current		remove - make leader
Emergency contact: Donald Miller 0707 456 1175								
<input type="checkbox"/>	1036	Richard John Rogers	HSBC The Square, Demoton Village, DM12 4RR	0123 456 1208	0707 456 1208	Current		remove - make leader
Emergency contact: Chris Smith 0707 456 1218								
<input type="checkbox"/>	1040	Walter Scott	Abbotsford Roxburghs, Demoton, DM6 9BQ	0123 456 1212	0707 456 1212	Current	Leader	remove - cancel leader
<input type="checkbox"/>	1042	Attila Theeman	1 Yurt Mews, Horde Street, Demoton, DM20 9XX	0123 456 1238	0707 456 1238	Current		remove - make leader
<input type="checkbox"/>	1046	Margaret Wales	29 Fircroft, North Demoton, DM1 1JL	0123 456 1248	0707 456 1248	Current		remove - make leader
Emergency contact: Terry Wales 0707 456 1249								
<input type="checkbox"/>	1049	Terry Wales	29 Fircroft, North Demoton, DM1 1JL	0123 456 1248	0707 456 1249	Current		remove - make leader
<input type="checkbox"/>	1047	Mike Young	16 Marks Tey Road, Stubbington, Demoton, DM14 3LE	0123 456 1270	0707 456 1270	Current		remove - make leader

Adding and removing members

To add new members to the group you must ask them for their membership number and enter it in the panel **Add member by membership number**. When a member is added, their name is shown for confirmation. More than one member may be added at a time by membership number. Separate the membership numbers by commas. You will not be able to add a person whose membership has lapsed, even if they can provide a membership number.

Press **Add** to add the members.

The address and contact details are picked up and entered automatically from the database. If you select the **Show Emergency contacts** option the emergency contact provided by a member is shown.

Members without email are shown by the icon of a letter with a red diagonal line through it.

When a new membership year starts in January, the names of members who have yet to pay their subscription will be shown in red and if the subscription is still outstanding at the end of February, their membership of Cheltenham u3a will lapse.

To remove members from the group, click **remove** in the last column.

If the Max members value has been reached, any additional members are placed on a waiting list and the date from when they were added appears in the **Waiting** column. Later, you click **join group** to make a waiting member an ordinary member of the group. You can choose whether to see the waiting members.

Managing Group Leaders

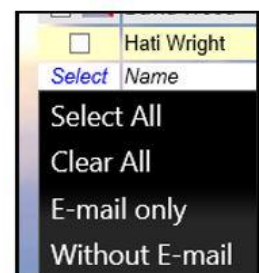
To add a group leader, click **make leader** in the last column. More than one leader may be assigned to any group.

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. Note that you should appoint another group leader before demoting yourself, as you will not be able to make any changes if you are no longer the group leader. A new group leader will need to obtain his or her username and password from the Cheltenham Beacon Administrator. You should also advise your Cluster supporter of the change in Group Leader.

Selecting Members

You can select members individually by the checkboxes against their name. Alternatively clicking on Select at the top or bottom opens a sub-menu where you can Select All, Clear All, select those with email or those without email.

Using the tick boxes at the top, you can select all members who are already group members, those who are waiting or everyone on the list.



Sending an email

To send an e-mail to group members. Select **Send E-mail** in the drop-down list at the end of the list of members, then press **Do with selected**. An email form will be displayed (see Appendix for more information on sending emails). Note that if you Select All, this will include waiting members unless you have unticked the waiting list box at the top.

Downloading Member Details

It is also possible to download details of the group members in PDF or Excel form by selecting that option from the drop-down list. However, you should not normally need to do this as the information is held securely in Beacon. For data protection reasons you should only download member details when needed for some purpose such as when organising an outing and then the information should only be kept for as long as is necessary for that purpose. Any printouts of the downloaded data must be treated as confidential and kept secure.

5.4 Ledger Sub-Page

The Group **Ledger** page can be used as a basic facility to account for monies paid out and received, for your group. If your group has agreed with the Cheltenham u3a treasurer to operate indirect accounting you should use this ledger to record income and expenditure. Groups using direct accounting may wish to use it to record money collected and transferred to the u3a current account. There is no connection between this ledger and the main accounts ledgers, although the Cheltenham u3a Treasurer can view your group ledger.

All transactions for the Group are shown between the selected **From** and **To** dates (which default to the current financial year), together with the incremental current balance.

To add a new transaction, enter, in the Add transaction block, the Date, Payee and Detail (the reason for the transaction). Then the amount, In or Out. Press **Save** to commit.

To edit or remove a transaction, select edit or delete at the end of the row, amend the transaction as required and click the Update button.

6 E-Mail Delivery

The e-mail delivery selection, available under **Misc** allows you to monitor the delivery of emails you have sent. You can see if they have been delivered or whether there have been delivery problems. Particularly useful is the ability to see delivery failures. The error message returned is displayed in red.

Possible message statuses you will see are:

Despatched by Beacon

The message has been sent to our email agent.

Processed

The message has been received by our email agent but not yet forwarded on.

Deferred

Our email agent is unable to establish communication with the recipient's email 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 email 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 (blacklisted) by our email agent and can only be unblocked by our Beacon Administrator.

Delivered

The message has been accepted by the recipient's email 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 email provider, usually because the address is incorrect, disabled or no longer valid. The error message returned is displayed in red and should be examined.

Blocked

This typically indicates a temporary delivery issue to an address. This could be because the recipient's mailbox is full or the recipient's email server is down or offline. Our email agent may retry to deliver.

Reported as SPAM

Reported by the recipient or their mail software as spam or junk email. This does not necessarily mean the recipient doesn't see the email.

7 Personal Preferences

Personal Preferences allows you to change your password and also your security question. You can also set the timeout period after which you be automatically logged off if the connection is not being used. The maximum time is 40 minutes.

The option regarding the sort order of drop-down lists has no relevance for Group Leaders as they do not access member drop-down lists.

Appendix – Sending Emails

When you select “Send E-mail” and click “Do with selected” on your members’ sub-page, the Send E-mail screen will be displayed.

Send E-mail

From:

To: Robert Barron <robert@demoton.co.uk>
Jennifer Johnson <jennifer.johnson@demoton.com>
Diane Miles <diane.miles@demoton.com>
Richard John Rogers <richard.rogers@demoton.com>
Walter Scott <walter.scott@demoton.com>
Attila Theeman <attila.theeman@demoton.com>
Margaret Wales <margaret.wales@demoton.com>
Terry Wales <terry@demoton.co.uk>

9 addressees

Tick to receive copy

Add Attachments

Subject

Edit Insert Format Table

Text **B** *I* [List Bulleted] [List Numbered] [List Indented] [Link] [Table] [Table] [Table]

Personalise this e-mail using tokens. Click one to insert.

Member		Member's Partner
#TITLE	Mr, Ms etc.	#P
#FORENAME	e.g. William	#P
#SURNAME		#P
#FAM	familiar name e.g. Will	#P
#MEMNO	membership number	#P
#EMAIL		#P
#TELEPHONE		#P
#TELEPHONE4	last 4 digits	#P
#MOBILE		#P
#MOBILE4	last 4 digits	#P
#EMERGENCY	emergency contact	#P
#AFFILIATION	home u3a	#P
#RENEW	renewal date.	#P
#LASTRENEW	last renewal date	#P
#FEE	renewal fee	#P
#LASTFEE	last renewal fee	#P
#MEMCLASS	membership class	#P
#GIFTAID	gift aid date	#P
#GROUPS	the member belongs to	#P
#ADDRESSH	address in 1 line	
#ADDRESSV	address over several lines	

The **From** address is taken from your member record.

The list of recipient 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, though this is not necessary if you have included yourself in the list of recipients.

Enter a **Subject** for your message and then compose the message in the blank area below.

You can format the text using the options available on the toolbar or in the drop-down **Format** menu.

Spell checking is included but this facility may require you to enable this in your browser and have a dictionary installed. If it is available, then identified spelling errors will be underlined with a squiggly red line.

You can insert **Images**, **Hyperlinks**, **Emojis** and **Tables** using the appropriate menu options.

Clicking the blue links on the right side of the browser will insert a **Token** at the cursor position that can be used to personalise your email. For example, **#FAM** customises every email with the member's **Familiar Name**. Some Tokens have **Partner versions** that are shown as **#P** to the right of the main Token.

Tokens can also be typed directly in the text and are not case sensitive, i.e. #FAM, #fam, #Fam, #fAM, etc. will all work.

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.

To include a website link in your message, put the cursor at the position where the link is to be and press the Link (Chain icon) button in the editor. In the resulting dialog box, enter the full website URL (including the http or https prefix) and the Text to Display in the email (this should be a meaningful description of the webpage you are linking to, rather than a copy of the URL).

After you have finished composing the email press **Send** to send the message

Some Notes on sending emails.

All messages are sent to recipients individually. Therefore, no recipient can see who else the message is sent to.

You can vary the line spacing in the message by using hard or soft returns: A Hard Return (using Enter) gives a full line space before the next line of text. A Soft Return (using Shift+Enter) will put the following words on a separate line immediately below the preceding text.

There is no practical limit to the number of attachments, but many email 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.

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 avoid or minimise sending attachments when sending an email to large lists of recipients.

It is recommended that attached files don't have long names or names that contain special characters such as brackets because these can sometimes cause delivery problems.

If the email browser is left open for a long time it may time out. Therefore, long emails are best composed outside of Beacon before copy and pasting into Beacon (or put the text into an attachment).