This document should be used in conjunction with the U3A Beacon Management System User Guide – Section 5 Group Operations- which will provide additional detail on using the functionality described in this document.

Purpose:
This document describes the functionality under the Administration Menu 'Groups', which includes:

- **Groups**
- **Venues**
- **Faculties**
- **Calendar**

Roles, Privileges and Functions.
This document describes all the functionality to maintain the relevant data, which includes the functions **Create, Amend, Display** and **Delete**. Some Roles will have privileges to perform all four functions, whilst other Roles may be restricted. Therefore, the privileges of any particular user of Beacon to use all or some of these functions will be determined by their role, which may restrict the functions that are available to a particular user.

The purpose of this document is to describe the processes used to:

1. Create a Faculty
2. Create a Venue
3. Show a list of Groups
4. Display a Group record
5. Create a new Group record
6. Add Events to a Group
7. Create a Calendar of Events
8. Add Members to a Group
9. Show Group Member's Details
10. Show Group Leaders
11. Send an Email to Group Leaders
12. Download a spreadsheet of Groups.
13. Group Ledger
14. Waiting Lists

After logging in to the Beacon system the Administration home page will show the functions available, which includes 'Groups'.

1. **Create a Faculty**

Faculties can be used to group together similar Groups.

To List current Faculties click on '**Faculties**' in the Groups Menu.

To create a Faculty go to the end of the list and enter the name of the new Faculty in the '**Add new faculty'** box and click on **'Save'**.

Please note, a duplicate Faculty name will be created if the name of the new Faculty already exist.

2. Venues - Create, Display, Amend or Delete

A Venue can be associated with a Group when a new Group is created.

Click on '**Venues'** in the Group menu. This will **Display** a list of current Group Venues, showing the venue name, contact details, telephone number and if the venue is accessible.

To create a new venue click on **'Add New Venue'**, which is in blue text above the title Group Venues.

Enter the name of the venue, the address and the postcode. Indicate if the address is a private address that should not be publicised or is fully accessible. Enter a telephone number, email address, contact details and any notes that may be useful, then click on **'Save Record'**.

To **Amend** an existing Venue record, click on the venue name in the Group Venues list, which will display the Group Venue record. Make the appropriate amendments and click on **Save Record**, which will implement the changes, but will display the changed Group Venue record on the screen.

A **Delete** button is displayed at the end of the record.

3. Show a List of Groups

Select '**Groups**' in blue from the 'Groups' menu list.

The screen will now show the current list of Groups, with some details against each Group name with columns headed:

- Group
- Active
- 'When'
- 'Where'
- 'Leader' (a Leader's name will be shown in red if a renewal is outstanding)
- 'Members' (the current number of members that have applied, including those that are waiting to join).
- 'Max' (maximum number of members).
- 'Waiting' (the number of members waiting to join).

To select the Groups in a particular Faculty click on the downward arrow in the 'Faculty' box at the top of the screen. The default setting for this box is '-any or none-'which will show all Groups. This will show the list of Faculties from which the required Faculty can be selected.

4. Display a Group Record

Click on the Group name to show the Group Record.
The screen will show the following data items to be added, amended or deleted.

- Group Name

- Faculty
- Status of the Group (Active or Inactive)
- Maximum Members
- Marker:- Allow members to join on-line
- Marker:- Enable Waiting Lists
- Marker:- Notify Leaders of Changes
- 'When' information: define when the Group meets.
- Normal Start Time
- End Time
- Contact: Enter 'Leader' and a telephone number or an email address for enquires about the group.

  For example 'Leader-07711234444' or 'rbannister@mmail.co'. There is a limit of 21 characters available.

  To find the leader of the Group, navigate to the list of Groups where the name of the leader of the appropriate Group will be displayed, then click on the leader's name to display the leader's details including mobile and/or landline telephone number and email address, if available.

  See sections 9 and 10 for more detail.

- Venue: The venue must already exist and can be selected from the drop down list.
- Information and Notes.

'**Save Record'** to save any changes or '**Delete'** to delete the Group record.

5. Create a new Group Record

Select 'Groups' from the Administration home page which will show the list of Groups.

Above the screen title 'Groups' in black there are two options in blue:
'Home' and 'Add New Group':

Click on '**Add New Group'**.

The 'New Group Record' will be displayed showing the data items as shown in 4. above.

Enter the data as required and click on '**Save Record'**.

The Group record for the new Group will now be shown and access to additional sub-pages will appear in blue in the line above 'Group Details':

- Schedule
- Members
- Ledger

6. Add Events to a Group
To schedule events for the Group select ‘**Schedule**’

Click on ‘**First Date and Time**’: A calendar will appear from which the appropriate date and time can be selected.

Modifiers ‘**then every**’ and ‘**days, weeks or months**’ can be selected to modify the first date and time.

Also select a ‘**Number of events**’ or a ‘**Not Beyond**’ date.

An ‘**End time**’ can be specified and a tick box can be used to exclude the schedule from the public calendar.

A ‘**Venue**’ can be selected from the drop down list, but this must have been created using the ‘Venue’ functionality.

Click on ‘**Add Events**’ to save the schedule.

To make subsequent changes or to delete an event use ‘**edit**’ or ‘**delete**’.

7. Create a Calendar of Events
A calendar showing the events for a Group can be produced.

Navigate to the Calendar menu item under ‘Groups’

A calendar of events can be shown by selecting

> **‘All’** which will show in chronological order all the events for all the Groups.
>
> ‘ **For Member’** which will show all the events relating to the member.
>
> ‘**Venue**’ which will show all the events relating to the venue.
>
> A PDF file can be produced which will contain the listing as shown on the screen.

8. Add Members to a Group
Navigate to the ‘Groups’ menu and select **Groups**.

The screen will now show a list of Groups.

Click on the required Group.

The screen will now show the Group Details and menu items for sub pages in blue:

Schedule

Members
Ledger

Select **'Members'**
The screen will now show a list of existing members.

At the bottom of the screen there will be shown:

- 'Add Member by name'
- 'Add member by membership number'

Select the member by name using the drop down list or by entering the member's membership number.

9. Show Group Member's Details
To find the contact details for members of a Group, using the Group list, click on the **Group** name.

This will show the Group details. Click on '**Members**' shown in blue above the Group Details. This will show a list of the members in the group and their contact details.

10. Show Group Leaders
Select **'Groups'** from the Groups menu on the Administration Home page.

This will show a list of Groups. Against each Group will be shown the name of the Leader in the column headed 'Leaders'.

Click on the leader's name. The screen will now show the member record for the leader which will include the contact details.

11. Send an Email to a Group Leader
Select the leader or leaders to whom an email is to be sent by navigating to the Group list and using the check box in the **Select column** (leftmost column) to select the leader or leaders.

At the bottom of the screen use the drop-down box to select '**Send E-mail to leaders'** and then click on **'Do with selected'.**

The screen will now display the **'Send E-Mail'** form.

From this point please refer to section 2 onwards in the separate process **'Sending E-Mail'.**

This process, together with the U3A Beacon Management System User Guide provides detailed information on sending E-mail through Beacon.

12. Download a Spreadsheet of Groups.
Navigate to the Groups list.

Click on the '**select'** box in the far left column for the Groups that are required in the download.

At the bottom of the list select **'Download'** from the drop down action selection box.

Click on '**do with selected'**

The details of the selected groups will be provided on a spreadsheet showing group name, leader, meeting information, venue and details.

13. Group Ledger
The 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.

Navigate to the Group List and select the relevant Group to show Group Details.

Select **Ledger**. This shows the list of transactions for the Group.

To add further transactions enter the Payee, transaction details and amount in the fields at the bottom of the screen, then **'Save'**

Transactions can be edited or deleted using the '**edit'** and '**delete'** functions.

A spreadsheet can be downloaded using the **'Download Excel'** button at the bottom of the transaction list.

14. Waiting Lists
Waiting Lists are invoked when the Group Details has the marker **'Enable waiting lists**' selected and the addition of a member to the group would exceed the maximum allowed. The new member is added to the list of members of the Group.
However, the list of Group members will show the members who are waiting to join the Group who will have a comment under their name which will record the date they joined the waiting list, for example, 'Waiting since 10^{th} Feb 2017'.

These members who are waiting will have had their name added to the list using the 'Add Member' function in the 'Group Member' screen.

If a Group has a Waiting List then the number of members of the Group will be the sum of the maximum number of members and the number on the waiting list.

End