

Note

Throughout this document words and phrases like 'our', 'we' etc. are intended to refer to Basingstoke – Old Basing U3A

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.

Logging in

Upon launching the system, a log-in screen is displayed. Select 'Basingstoke – Old Basing', 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. The system will automatically send you to a screen where you do this.

If you have forgotten your username or password, use the <Click here> link or talk to the System Administrator who can reset it.

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 means that for many 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.

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.

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.

Table lists

Many lists have the letters of the alphabet in a row above the list. Clicking on one of these letters will scroll the list to the first item in the main column (such as a member's surname) 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.

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.

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.*

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.