

Group Leader access

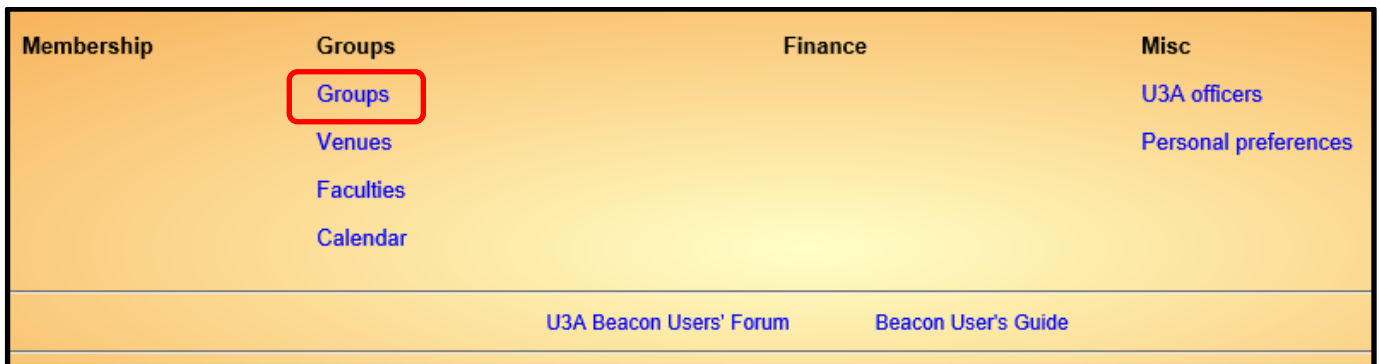
Parts (a) and (b) below describe how a Group Leader can view the Group Record for their Group. Editing of Group Records is covered in parts 5.2 to 5.5.

Groups Co-ordinator access

Part (c) below describes additional functionality which is typically only available to Groups Co-ordinators, Committee and Administrators.

a) The Groups List

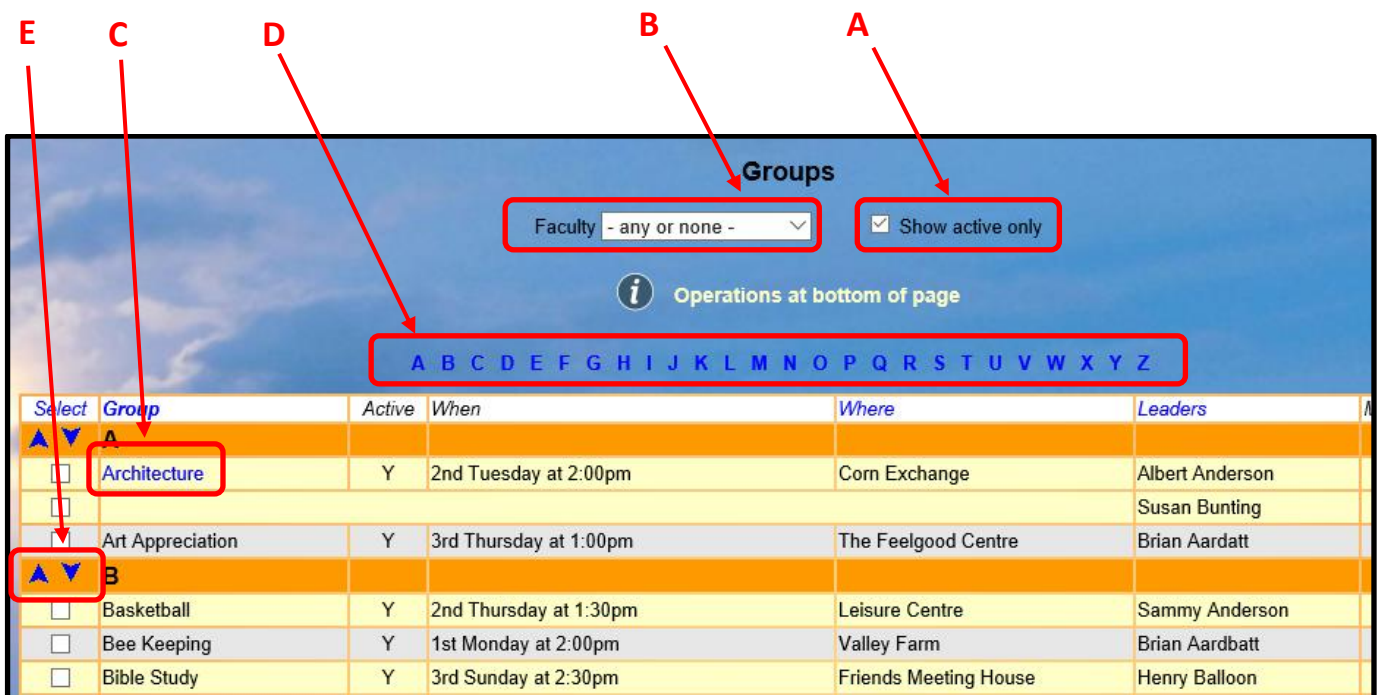
As a Group Leader your Home Page will usually look similar to that shown below, depending on the extent of system access given to you by your U3A committee.





Click the blue **Groups** link to view the Groups List, which initially shows all active Groups and Group Leaders. To include non-active Groups, untick the **Show active only** box [A].

Your U3A may have used the option to categorise similar Groups into **Faculties** such as 'Art & Literature', 'Food & Drink', 'Walking', etc. To display the Groups assigned to a particular Faculty, select the Faculty from the drop-down list [B].

Groups for which you are a Leader or you have viewing or editing rights are **highlighted blue** [C].



There are several features to help quickly navigate around the Groups List page:

- Clicking any letter in the block above the table [D] will jump to Groups starting with that letter.
- Clicking the 'down' arrow in the top right corner of the page will scroll to the end of the list at the bottom of the page. 
- Clicking the 'up' arrow in the bottom right corner to scroll back to the top of the page. 
- The up and down arrows in the left column [E] perform a similar function.

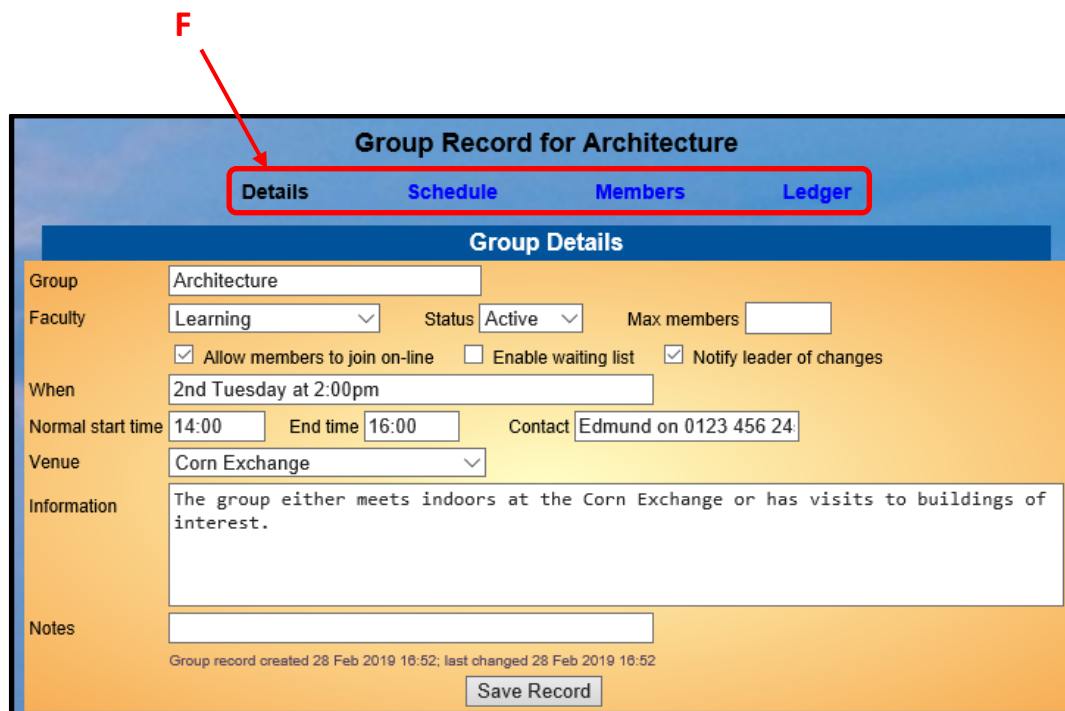
b) Group Records

Groups for which you are a Leader or for which you have viewing or editing rights are **highlighted blue**. To view the **Group Record** for one of these Groups, click on the Group name in the Groups List, or elsewhere where Group names are shown.

Each Group Record comprises four sub-pages:

- **Details** see 5.2
- **Schedule** see 5.3
- **Members** see 5.4
- **Ledger** see 5.5

You can select between these on the row beneath the Group Record name [F]. The active sub-page has its name in black.



F

Group Record for Architecture

Details Schedule Members Ledger

Group Details

Group: Architecture

Faculty: Learning Status: Active Max members:

Allow members to join on-line Enable waiting list Notify leader of changes

When: 2nd Tuesday at 2:00pm

Normal start time: 14:00 End time: 16:00 Contact: Edmund on 0123 456 24

Venue: Corn Exchange

Information: The group either meets indoors at the Corn Exchange or has visits to buildings of interest.

Notes:

Group record created 28 Feb 2019 16:52; last changed 28 Feb 2019 16:52

Save Record

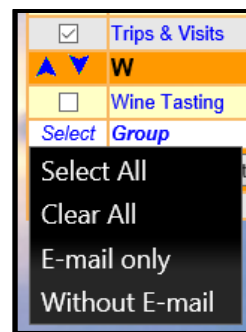
For details of how to view and edit your Group Record pages, refer to parts 5.2 to 5.5.

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c) Groups Co-ordinator operations

Users with roles such as Groups Co-ordinator or Committee Member may be able to send emails to Group Leaders, download Group details or create and delete Groups, depending on the extent of system access allocated to them.

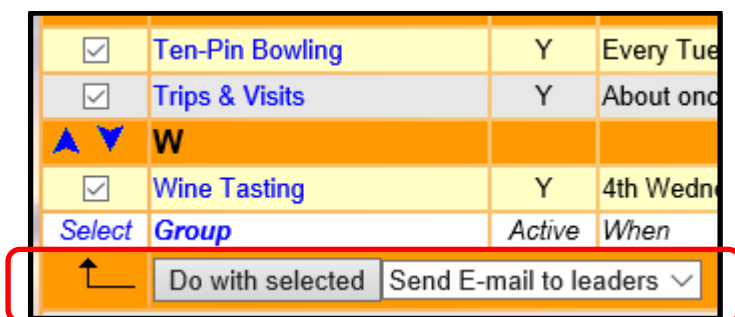
To select one or more Groups prior to performing any of the operations described below, tick the required box(es) in the left hand column. Or click 'Select' at the bottom of the column, followed by one of the choices from the drop-down list that appears:



- **Select All** for all displayed Groups/Leaders
- **Email only** for Group Leaders with an email address
- **Without email** for Group Leaders without an email address

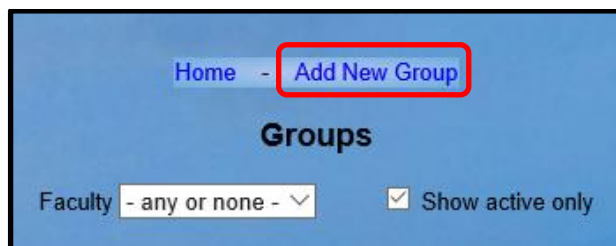
After selecting one or more Groups or Leaders, the following operations are available by choosing from the drop-down list below the table and pressing the **Do with selected** button:

- **Send email to leaders:** opens a form on which you may compose an email for sending to the selected Group Leaders (see 6.1).
- **Download groups:** to generate an Excel file showing the Group Leader, Meets, Venue & Details.



Adding a New Group

To create a new Group Record, either click **Add New Group** at the top of the Groups List page:



or, click **Add New Group** at the top of any other Group Record:



Fill in the Group Details as described in part 5.2 and then press the **Save Record** button which saves the Group **Details** page and creates the **Schedule**, **Members** and **Ledger** pages.

Go to the **Members** page and add one or more Group Leaders to the Group as 'ordinary' members before elevating them to Leader as described in part 5.4c.

Usually Group Leaders will be set up as a **System User** and assigned the '*Group Leader*' **Role** to enable them to view and edit Group Records. This can only be done by your System Administrator.

It is possible for members to be designated as Group Leaders in Beacon without being given System User access – perhaps so that they can be included on emails to Group Leaders sent from the Groups List page.

Deleting a Group

Group Records may be deleted by pressing the **Delete** button [G] on the Group **Details** page.

Alternatively, you may prefer to change the **Status** of the Group to **Inactive** [H] which will retain the Group and allow it to be reinstated at a later date. Inactive Groups are not displayed on the Groups List unless the **Show active only** box is unticked [A].