5. Groups

Note: The generic terms 'Group' and 'Group Leader' are used in this User Guide. Beacon may be customised to display alternative terms such as 'Course', 'Convenor' or 'Coordinator'.

5.1. Groups List

Click **Groups** on the Home Page to show a list of active groups. To include non-active groups, untick **Show active only**. To display groups assigned to a particular faculty, select the **Faculty** in the drop-down list.

Groups for which you are a Leader are highlighted blue.

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

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

5.1.1. Group Record

A Group Record may be displayed by clicking on a group name in the list of groups, or elsewhere where group names are shown.

The 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 title. The active sub-page has its name in black.

After making any changes to a Group Record, press **Save** to commit them.

Press **Delete** to remove the Group Record (or consider changing the **Status** to **Inactive**).

5.2. Group Record: Details

This holds basic information about the group, including its **Faculty** (optional) and **Status**.

- The **When** field is free text and used only to give general information about when the group meets, e.g. “2nd Thursday at 2:00pm”.
- The **Start time**, **End time** and **Venue** are optional and are used as defaults when meetings and events are created.
- The **Contact** field can be used to give a person's name, telephone number or email address for enquirers to make contact, e.g. “Jane on 0123 456 7890”. Be aware that this information may be visible to U3A members or the public, depending on how the Public Links are configured (see 9.4).
- **Max members** can be used if there is a limit on the number of members that the group can accommodate. When the limit is reached, members may still be added via the group’s Members page or via the main Members page and are shown with a “waiting since” date. However, members are not able to join a full group via the Members Portal (see below).

- Ticking **Allow members to join online** lets members join the group (or waiting list, if enabled) via the Members Portal.
- Ticking **Enable waiting list** lets members join a waiting list via the Members Portal if the Max members figure has been reached. Even if the box is not ticked, members may still be added via the group's Members page or via the main Members page.
- If **Notify Leader** is ticked the Leader will be notified by email when a members joins the group or the waiting list.
- When populating the **Information** field, be aware that this information may be visible to U3A members or the public, depending on how the Public Links are configured (see 9.4).
- The **Notes** field is for private notes that are not displayed to the public.

5.3. Group Record: Schedule

This shows future meetings or events of the group. To show extra detail about the meetings where this is available, tick **Show Detail**.

5.3.1. To add new meetings or events

In the **Add Events** panel in the **Group Schedule**, select the date and time for the first event. Then select the number and frequency of events in the controls to the right. One frequency option will be something like "*4th Sat of each month*". The number and weekday will reflect the date selected for the first event.

In the **Until** row, you may select either a fixed number of events to be created, or to create events repeatedly up to a selected end date.

When you have completed the other fields (which are optional but you should seek to give as much information as possible), press **Add Events** to create the new events.

5.3.2. To change an event

Click **edit** at the row end for the required event in the **Group Schedule**.

Make the changes required and press **Update**.

5.3.3. To remove an event

Click **delete** at the row end for the required event in the **Group Schedule**.

Note: At present there is no facility to change or remove several events at a time.

5.4. Group Record: Members

This is used to record U3A members who are members of the selected group.

- If a member is not current, their name will be highlighted in red. They should be removed from the group if they do not renew.
- Members without email are denoted by an icon of a letter with a red diagonal line through it.

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

- **Send email**: opens a form on which to compose an email (see 6.1).
- **Download Excel**: to download a spreadsheet of member details. You will be asked to choose which fields to include (email, telephone, mobile, address, emergency contact).

- **Download pdf:** to download a pdf file of member details. You will be asked to choose which fields to include in the document (email, telephone, mobile, address, emergency contact, photo (if available).

5.4.1. To add new members to a group

There are 2 ways to add members on the **Group Members** page:

- By selecting a member's name from the **Add member by name** drop-down list and pressing **Add**, or
- By entering the member's membership number under **Add member by membership number**. More than one member may be added by separating the numbers by commas. After pressing **Add** you will be prompted to confirm that the correct members have been selected.
- If the Max members value has been reached, any additional members are placed on a waiting list with a 'waiting since' date.
- Click **Join group** to make a waiting member an ordinary member of the group. This may be done irrespective of whether the max members limit has been reached.

Notes:

- *Members may also be added to a group from the Members List (see 4.1) and Recent Members list (see 4.4).*
- *When the max members limit has been reached, members may still be added to the waiting list irrespective of whether 'Enable waiting list' has been ticked on the group Details page.*
- *Members on a waiting list are not automatically added to the group when a vacancy arises.*
- *The number of members of a group as shown on the Groups page (3rd column from the right) includes any members on the waiting list.*
- *Be aware that when choosing **Select all** prior to picking from the drop-down list below the members table, that waiting members will be included in the selection. Also that waiting members are shown as members of that group in their Member Record.*

5.4.2. To remove members from a group

There are 2 ways to remove members on the **Group Members** page:

- Individually by clicking **remove**, or
- Several at a time by ticking the members in the **Select** column, selecting **Remove Members** in the drop-down list below the table and pressing **Do with selected**.

5.4.3. To add a group leader

A group leader must first be added as a member of the group. Then click **make leader**. More than one leader may be assigned to any group.

5.4.4. To demote a group leader

Click **cancel leader**. The person will remain a member of the group.

5.5. Group Record: Ledger

This can be used as a basic facility to assist group leaders to account for monies paid and received. There is no connection between these ledgers and the main Treasurer's ledgers.

On entry, all transactions are shown for the group between the selected dates (which defaults to the current financial year) together with the incremental current balance.

5.5.1. To add a new transaction

Under **Add transaction** enter the **Date**, **Payee** and **Detail** (the reason for the transaction). Then the amount, **In** or **Out**. Press **Save** to commit.

5.5.2. To edit or remove a transaction

For security reasons, transactions should not normally be edited or removed. If an error has been made, add a new transaction but with reversed amount (**In** <> **Out**), to cancel the original.

5.6. Add New Group

Click **Add new group** in the list of groups or from an existing Group Record. At first only the **Details** sub-page is shown. Upon saving this, the other sub-pages will appear.

5.7. Group Venues

To display a list of current venues, click **Venues** on the Home Page.

To show a **Venue Record**, click on the venue name.

After making any changes to a Venue Record, press **Save** to commit them.

Press **Delete** to remove the Venue Record.

5.7.1. To create a new Venue Record

Click **Add new venue** from the list of venues or an existing Venue Record.

All fields in a Venue Record are optional except the venue name.

Private address should be ticked if the venue is a private residence or somewhere else for which the details should not be displayed in publicity (such as in online group information). **Accessible** may be ticked to indicate that the venue is fully accessible.

Buttons next to the **Postcode**, **E-mail** and **Website** fields may be used to view a map of the address, send an email or display the venue's website, respectively.

Press **Save record** to create the venue.

Note: Some groups and trips meet at one venue before travelling to a different location. To deal with this situation you may find it worthwhile creating 'meet at' venues, e.g. "Meet at the Station car park".

5.8. Faculties

Faculties may be used to group together similar groups. The list of current faculties is displayed by clicking **Faculties** on the Home Page.

Press **edit** to change a faculty name and **Delete** to remove the faculty.

5.8.1. To add a new faculty

Enter the faculty name under **Add new faculty** and press **Save**.

5.9. Calendar

The calendar is a chronological list of meetings and events. All events from the Group Schedules are incorporated automatically into the calendar. In addition, it is possible to add general or open meetings.

The calendar shows events between the displayed dates, which defaults to the next 3 months. You may change the dates in the **From** and **To** fields.

At the top of the calendar you can choose to **Show all** events between the displayed dates, only those events for groups of which an individual is a **member** (select their name from the drop-down list) or only those events that take place at a selected venue.

By ticking **Show detail**, you will also see additional detail for events where this is available.

You may go directly to the event record (perhaps to edit it) by clicking the event's date/time in the list. You may go to the Group Record by clicking the group name. You may go to the Venue Record by clicking the venue name.

Where a venue's postcode is known, a **map** link will display a map of the location.

5.9.1. To download the calendar

Click **Download PDF** at the bottom of the calendar to download the displayed events.

5.9.2. To view or add open meetings

Click **Open Meetings** at the top of the page. A list of open meetings is displayed with a layout similar to that for group meetings (see 5.3). You may add, edit and remove meetings in the same way as for group meetings.