u3a SiteWorks Register T&Cs

Revision History

Version	Date	Author	Change summary
1	2023-11-02	Graham Tigg	First version
2	2023-11-03	Graham Tigg	Mark's corrections added
3	2023-11-03	Graham Tigg	More comments

1 Introduction

The SiteWorks Team need to keep records on SiteWorks sites and their status for purposes ranging from T&Cs signed to emailing admins of production sites and future charging.

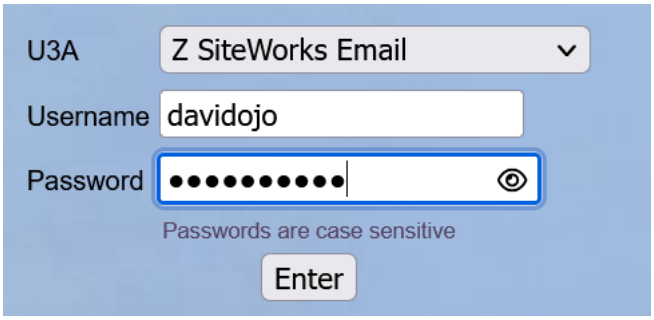
The Trust receives notification that T&Cs have been signed for a site. These are instructions on how to register this on the Beacon system so the SiteWorks team are aware.

Note that Beacon is designed as a membership system for u3as and is being used to manage SiteWorks as it is fully integrates with bulk emailing. This does mean that we have had to shoehorn information into fields intended for other purposes. For example, phone numbers are being used to store dates.

2 Loggin into Beacon

You will have been issued a Beacon user name, for example 'davidojo', and a password.

Navigate to https://u3abeacon.org.uk. You occasionally need to accept the optional cookies.



From the dropdown select the Beacon site **Z SiteWorks Email**. Typing 'z' will quickly scroll down the list. Enter your **username** and **password** and click **Enter.**

The main menu screen will appear:

Highlighted is **Personal Preferences** to change your password and recovery question and answer. Click on the Beacon Help icon (bottom left) for more instructions.

Members is used to locate the record for a site.

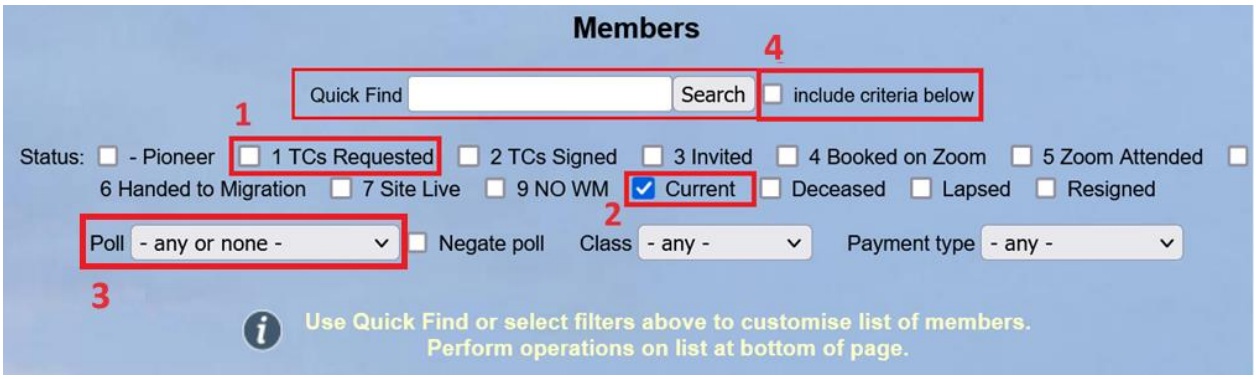
3 Updating T&Cs status

3.1 Locating a site

Note: Do take care identifying sites as there are often minor variations in the exact name submitted.

The first step is to locate the site that has signed T&Cs. Click on **Members** to list sites.

We use the **Status** of a record to track sites through their life-cycle.



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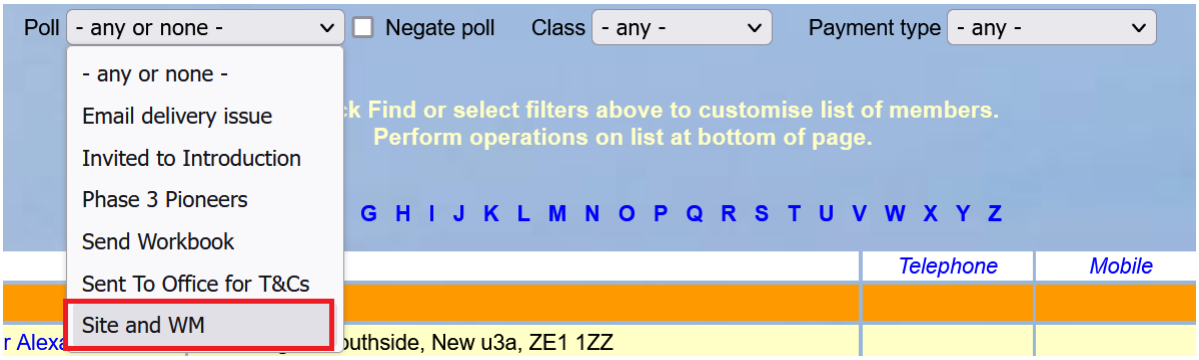
To only list site we have requested to sign T&Cs then:

1 Tick **1 TCs Requested**

2 Un-tick **Current,** so you see:

3 Set the **Poll** 'Site and WM' (avoids multiple results for the same u3a)

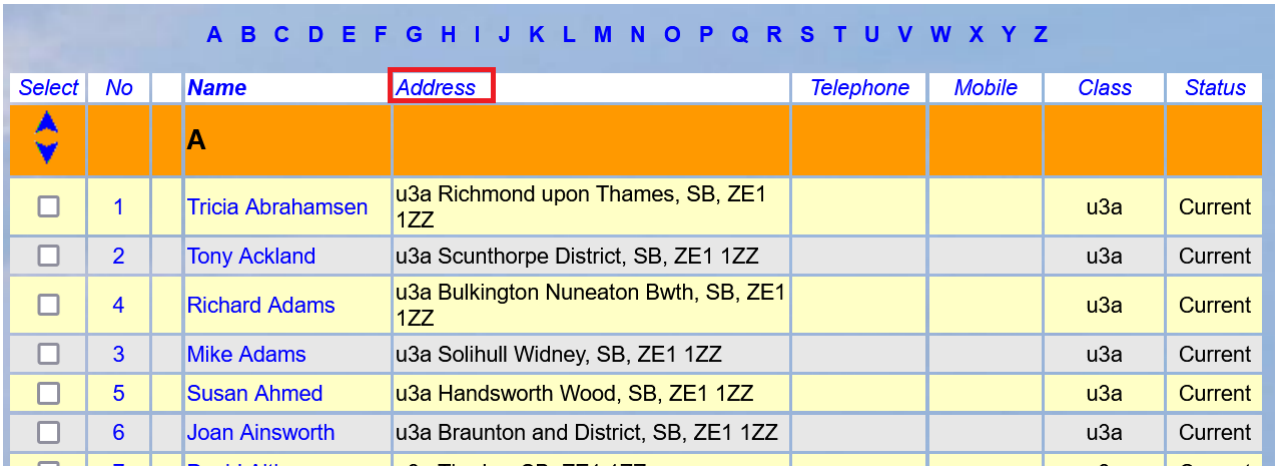


This will list sites.

Select	No		Name	Address	Telephone	Mobile	Class	Status
			A					
☐	13		Nick Amery	u3a Halesworth District, SB, ZE1 1ZZ			u3a	1 TCs Requested
			B					
☐	31		Sue Bailey	u3a West Bridgford, SB, ZE1 1ZZ			u3a	1 TCs Requested
☐	761		Mark Bradley	u3a Skiddaw, SB, ZE1 1ZZ			u3a	1 TCs Requested
☐	101		Annie Burkitt	u3a South Bucks, SB, ZE1 1ZZ			u3a	1 TCs Requested
Select	No		Name	Address	Telephone	Mobile	Class	Status

Do with selected | Send E-mail

The sort order is by the name of the site's admin (Web Manager). Click on the column heading **Address** to sort by site – this will help locate the site if the list is long.



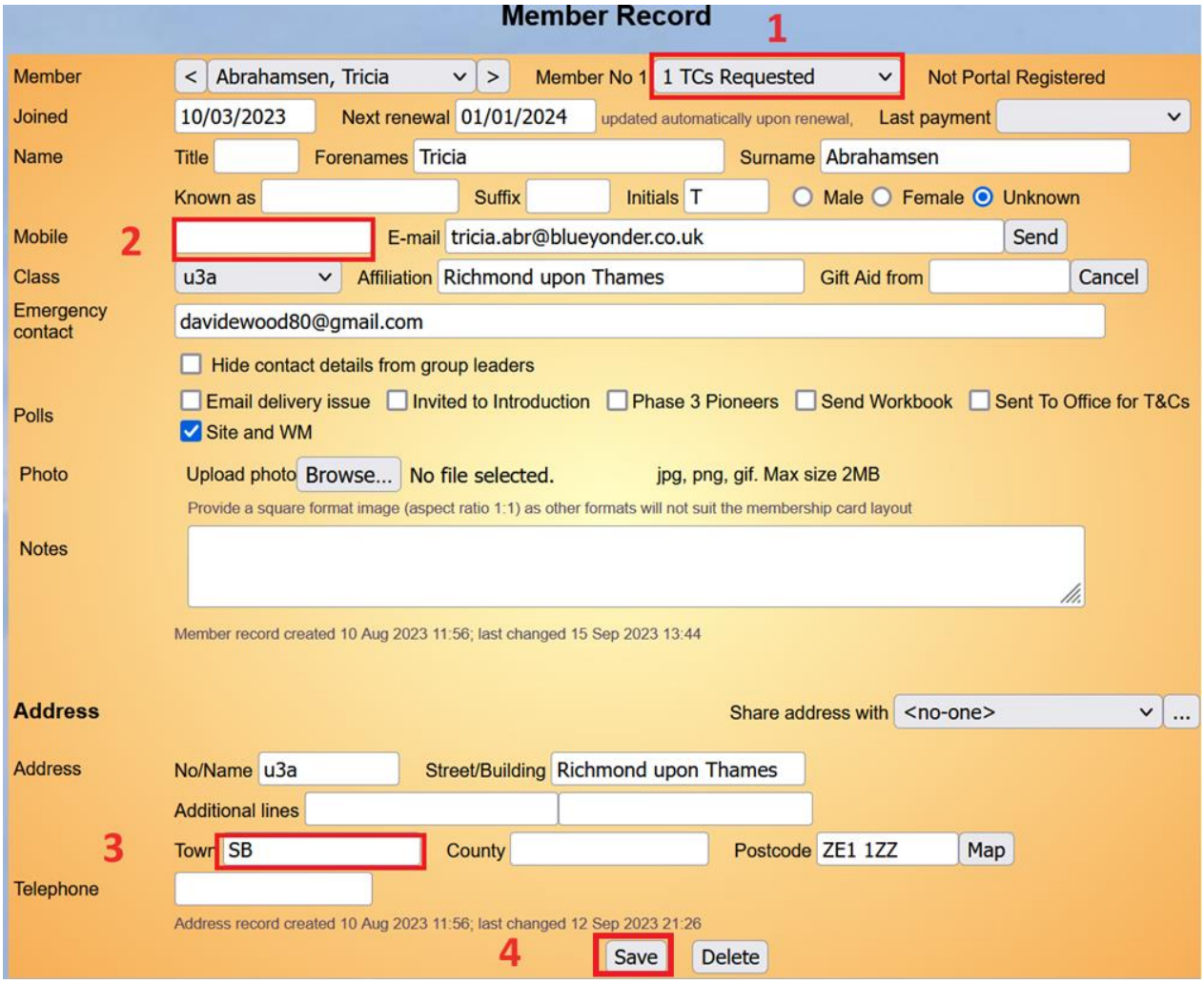
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select	No		Name	Address	Telephone	Mobile	Class	Status
			A					
☐	1		Tricia Abrahamsen	u3a Richmond upon Thames, SB, ZE1 1ZZ			u3a	Current
☐	2		Tony Ackland	u3a Scunthorpe District, SB, ZE1 1ZZ			u3a	Current
☐	4		Richard Adams	u3a Bulkington Nuneaton Bwth, SB, ZE1 1ZZ			u3a	Current
☐	3		Mike Adams	u3a Solihull Widney, SB, ZE1 1ZZ			u3a	Current
☐	5		Susan Ahmed	u3a Handsworth Wood, SB, ZE1 1ZZ			u3a	Current
☐	6		Joan Ainsworth	u3a Braunton and District, SB, ZE1 1ZZ			u3a	Current

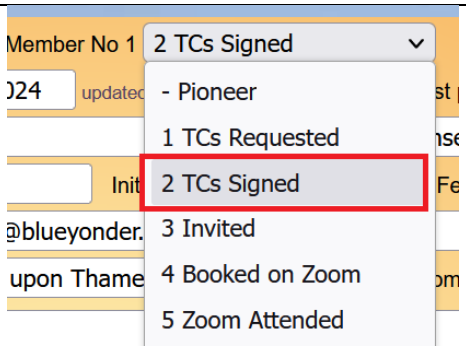
To open the record on the located site click on the blue name. For example, to open the first site Richmond Upon Thames click on **Tricia Abrahamsen**.

4 Note that you can also use the '**Quick Find**' search, but you must tick **Include criteria below** and be confident the term is included in the u3a name.

3.2 Update the site record



Update three fields before Saving.

	**1** Change the status from 1 TCs Requested to **2 TCs Signed** using the dropdown

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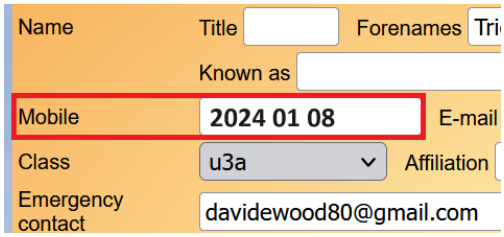
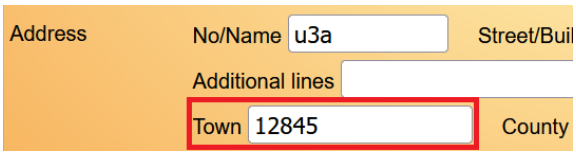
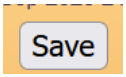
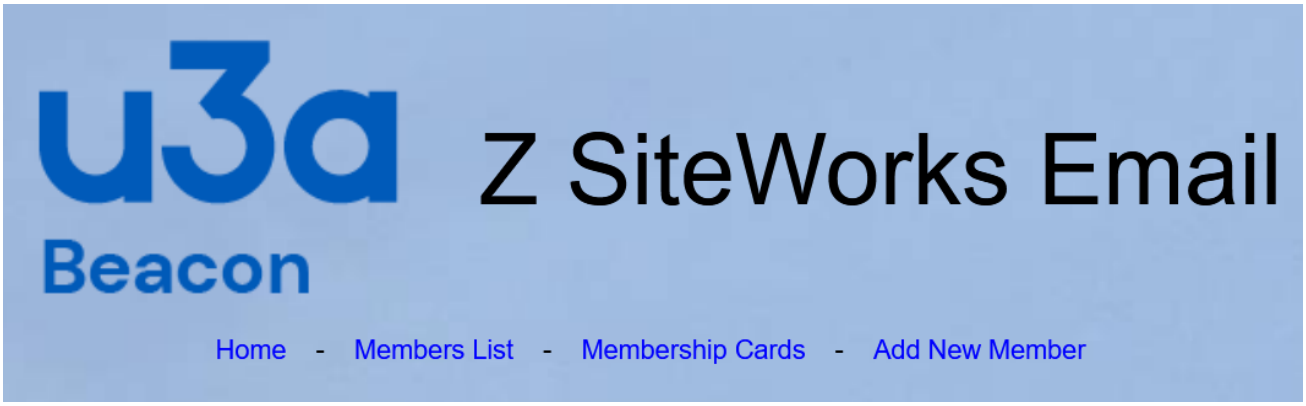
	**2** Enter the date in the Mobile phone number field in the format yyyy mm dd So for 8th January 2024 enter **2024 01 08** (this is used for sorting u3as)
	**3** Enter u3a's unique identifier from Netsuite. This will definitively identify the u3a when charging starts in 2025.
	**4** Save the changes

Further edits can be made after saving, just save again.

To repeat for another u3a click on **Members List**



You can logout by clicking **Home** and then **Log Out.**