



Information Systems used in u3a in Kennet – for Group Leaders

1. Introduction

This document describes the IT systems used to support the activities of u3a in Kennet, sets out some policies and describes how the various systems should be used.

2. Email

email is used as a primary communications method in u3a in Kennet. The Executive Committee uses it extensively to circulate information and to get feedback. Group Leaders use email for two-way communication with the members of their groups. Members use email to communicate with the Executive Committee and with Group Leaders. Non-members can generate emails to the Executive Committee (eg chair@u3ainkennet.org.uk, membership@u3ainkennet.org.uk) using options on our website (see **Website** below).

In March 2023 we had 23 members (around 3%) without email access. Some of the members with email accounts have varying degrees of difficulty accessing email including difficulties reading attachments or accessing links. Members use a wide variety of devices and software to access emails and this can pose difficulties when trying to resolve problems. We have to ensure that we do not disenfranchise members without email addresses.

To protect personal emails from inadvertent disclosure, we have set up u3a email accounts (“u3a emails”) for all Executive Committee members and Group Leaders on the domain u3ainkennet.org.uk. These email addresses can be published on our website and elsewhere without disclosing personal email addresses. Using these u3a email accounts also means that u3a emails can be kept separately from other emails.

The u3a emails can be accessed directly by setting them up as an additional account on the device or system used to access emails. This enables emails to be both received and sent from the u3a email account. It also means that email history is available to the new incumbent of the particular role (either Group Leader or Executive Committee Member) as the email account is allocated to the new incumbent with a change of password. It also means that u3a emails can be accessed in the event of an emergency such as illness.

The u3a email accounts can also be accessed on the web as follows:



Information Systems used in u3a in Kennet – for Group Leaders

- go to the link <https://server.u3ainkennet.org.uk:2096>
- enter your u3a email address and its associated password.
- when the web interface opens, click the OPEN button just under the ROUND CUBE logo.

For Group Leaders or Executive Committee members unable or unwilling to access the U3A email accounts directly, emails will be automatically forwarded to the individual's personal email account. The disadvantages of this are that outbound emails (eg replies to emails) will come from the individual's personal email account thus disclosing it to the recipient and there will be no direct access to prior emails on handover of responsibilities.

U3a emails are not backed up centrally, so users should ensure that key emails are backed up locally. Users of Microsoft Outlook may store mail locally on their computer and not on the server. In this situation, care should be taken when transferring mail to a new computer.

Putting "u3a" as the beginning of the subject line in an email makes it easier for the recipient to find u3a emails when they are mixed with other emails (eg by sorting emails on subject).

To ensure compliance with the General Data Protection Regulation (GDPR), Group Leaders and Executive Committee members should ensure they don't disclose members' email addresses to others. If they are sending an email to a group of members using the members' personal email accounts, they should use the "blind copy" (.bcc) function. The only exception to this is if they have explicit permission from all those addressed to allow their email address to be shared. So, for example, all members of a group may agree that their email addresses can be shared within the group. In that situation, care should be taken to ensure that the addresses are not inadvertently shared outside the group. Group Leaders should also ensure that any new members to the group also agree to have their email address shared. Group Leaders sending emails via Beacon (see below) avoid this problem.

The Beacon Membership Management system (see below) contains a "mass mailing" function for sending out emails. It is used to distribute our monthly newsletter and annual renewal notices. It is also used by some larger groups to send out information to their group members. Sending emails using the Beacon mailing function avoids the problem of disclosing email addresses as it never shows



Information Systems used in u3a in Kennet – for Group Leaders

other addressees in the email. Beacon should not be confused in any way with the u3a email accounts described above. They are quite separate. Beacon will always send emails to the personal email address of the member. However, a Group Leader can be set up so that their Beacon emails come from their u3a email address and any replies are sent to their u3a email address.

3. Email – Spam

We have had several instances of intimidating and malicious emails being sent to u3a email addresses recently. These have included requests for payment of invoices apparently originating from within our u3a. We have also had sexually graphic emails demanding money. Our email server has a “spam” filter – but some rogue emails get through this. **If you have any doubts about an email – don’t open any attachment or click any links and don’t reply either (by replying you confirm that your email is valid which is valuable to many hackers).** You can often tell an email is from a hacker by hovering your mouse over the sender’s email address where you will find that the email address is not the one displayed. Delete all such emails and seek advice from our web team (technology@u3ainkennet.org.uk) if you have any concerns.

4. Document formats

4.1. Microsoft Office formats – for documents shared for update

Documents (including spreadsheets) have a large role to play within u3a in Kennet. Documents should be created or saved in Microsoft Office formats (.doc or .docx for text documents, .xls or .xlsx for spreadsheets and .ppt or pptx for presentations) wherever possible.

Many members (and some Executive Committee Members) do not have Microsoft Office on their computers. Some use free alternatives such as *Open Office* or *Libre Office* which are based on the “Open Source” software. These alternatives can read and open Microsoft format documents, but, by default, they create and store documents in Open Document Foundation (ODF) formats: (.odt for text documents, .ods for spreadsheets and .odp for presentations). These formats are not readable by older versions of Microsoft Office and other devices including some tablets and phones used by many members. Therefore is **it recommended that whenever a document is circulated within u3a in Kennet for update it should be saved in Microsoft Office format (.docx, .xlsx, .pptx).** It should be noted that

Information Systems used in u3a in Kennet – for Group Leaders

there are minor formatting differences between the ODF and Microsoft formats. For normal use, these are not an issue but care should be taken with the use of complex formatting in text documents and complex formulae in spreadsheets.

Apple products have their own office formats: Pages, Numbers and Keynote. These are shareable within the Apple product range (laptops, tablets and phones) but are not easily readable on non-Apple devices and systems. Documents with these formats should not be shared. The Apple products enable documents to be saved in Microsoft Office format.

4.2. Portable Document Format (PDF) – for final versions of documents

When a document is final and not being circulated for update by the recipient, it should be stored in Adobe Portable Document Format (PDF) which preserves the content and format of a document and can be thought of as a “printed” copy of the document. PDF is thus designed to be an un-editable copy - ideal for archiving. Most office systems allow a document to be saved as a PDF.

5. Beacon Membership Management System

The Beacon Membership Management system was established in 2016 by a group of u3as looking for a better way to track and manage their membership. It is now supported by the Third Age Trust who make a charge to u3as using it to cover support costs. In January 2019 the Third Age Trust started the process of looking for an alternative, less costly, solution which is designed to be rolled out in 2020. However this was later abandoned, and replaced by incremental improvements to the existing Beacon system.

The system records details for each member of u3a which we use for membership tracking, membership renewal, group management and emailing (as described above) and some other functions such as tracking and claiming Gift Aid. There are other functions, including financial elements, which we do not use.

Access to Beacon is controlled by the Membership Secretary. All Executive Committee Members have access and it is open to all Group Leaders to ask for access. The access is controlled to ensure that any Beacon User is only able to see and update information relevant to his or her role. So, for example, a Group Leader will be set up so that they can only see the details of members of the group which they lead.



Information Systems used in u3a in Kennet – for Group Leaders

All Beacon users must sign a declaration to confirm that they will only use Beacon in specified ways and comply with the General Data Protection rules regarding not sharing data.

6. u3a in Kennet Website

The website is maintained using Wordpress hosted on a commercial server. It is managed by a website group who all have access to the administration of the site.