

Beacon: A Guide for Group Leaders

Welcome to Beacon the U3A on-line system for managing members and groups

This tutorial describes the particular use of Beacon by Group Leaders and Group Administrators. It does not describe the general access which all members of Thornbury u3a have to Beacon: this is through a different login page and uses a different username and password. A Group Leader will, therefore, have two logins: one as Group Leader and the other as a member of Thornbury u3a.

You have been set up as a Group Leader for the Beacon system and have been sent an email giving you a username with a temporary password. You will be asked to change this password the first time you logon.

For each group there can only be one "Group Leader". Other members taking a leader role will appear in Beacon as "Group Administrator". Group Administrators have the same access and privileges as Group Leaders.

You should log in to the website <https://www.u3abeacon.org.uk>. For the U3A field, either click the small arrow and scroll down or start typing **Thornbury** then choose the name from the list. Put in your **Username** and **Password** that were given in the email. You will be asked to change the password on your first logon, so please make a note of your new one as you will need it next time you logon.



Beacon Login Screen

Access your Group's information

On the home screen click on Groups in the yellow box under the heading "Groups"

Select your Group from the list, scrolling down if necessary. The group(s) you have access to will be shown in blue. Click on the group name.

A screen headed Group Details will appear. On this screen you can change any of the details.



Group Details

Just below the title of your group there are several options, if you select “Members” you will see a list of the current members of the group. You can see details of a particular member by clicking on that member’s name.

Add members by name or number

From the Group Details screen display all current members.

Scroll to the bottom of the list of group members, or a quick way if there are many members, click on the black down arrow on the top right hand side of the screen which will take you to the bottom of the list.

Here you can add members by name or number. To add a member by name, click on “select member” and scroll down the list. A quick way is to start typing the Surname in the box and it will take you to those surnames beginning with the letter, or word, you have typed. You can then select the appropriate new member.

When you have chosen a name, the member’s number appears below it. You can use this to check that you have the correct name – particularly if two members have the same name!

The list displays members alphabetically by surname, but not then by first name so for example you may have to scroll down all the Jones to find the right one.

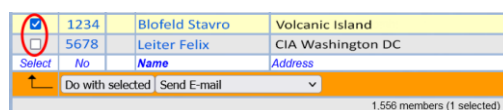
If you have many members to add and have their membership numbers, adding by number is the quickest way.

Contact Group Members by email

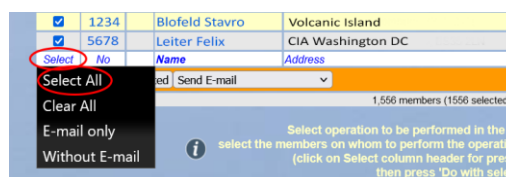
Once you have accessed your group members, choose the members to whom you wish to send an email. To select a member, click in the box to the left of the name.

To select all members, go to the word “Select” at the top or bottom of the list. A drop down list appears, click on which ever choice is appropriate: usually “Select All”.

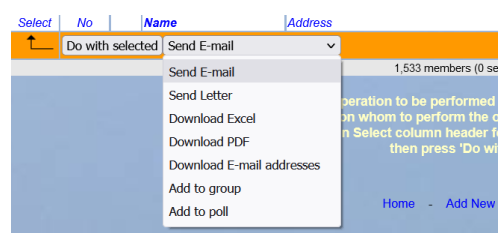
At the bottom of the list, Click on “Send E-mail” (the default) to get a menu offering choices such as “Send E-mail”.



Select individual recipient



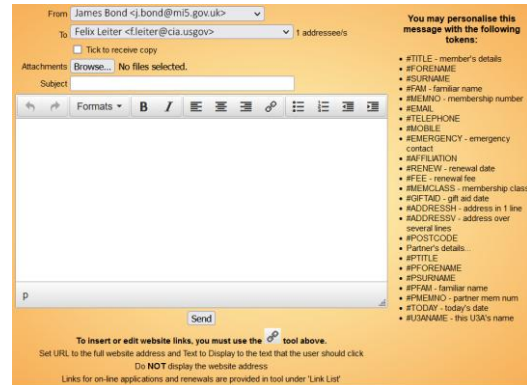
“Do with selected”: Select All



“Send E-mail” menu

Next to the “Send E-mail” box is a button called “Do with selected”. Click on this and a new screen appears with a form with the “From” and “To” boxes filled in. Fill in the Subject details and type your email. Down the right hand side is a series of tokens you use to personalise your email. One you are most likely to use at the start of an email is “Dear #FORENAME” which then will address your email to each member personally by their first name.

If you wish to send an attachment click Browse at the side of the word “Attachments” above the title box, and search for the document locally, on your computer. Double click and it will be added and the title shown.



Send E-mail

You will notice the “Tick to receive copy” is ticked. It will just send you one copy, however you can untick if you wish.

Press Send to send your emails. The screen will change to Send E-mail then E-mail sent successfully. If you now press “Home” to return to the Home Screen, you can choose “E-mail Delivery” to see the progress of the emails you have sent.

Download a list of Group Members in Excel or PDF

Select members as if you were going to send an email.

From the “Send E-mail” menu choose “Download Excel” or “Download PDF” then click “Do with selected”. A screen will appear asking you to choose which information you wish to have included in your list, once you have made your selection click Download and your list will be downloaded.