

HOW TO USE BEACON AS A GROUP COORDINATOR

Note that Beacon calls the Coordinator a Leader

If you have not used Beacon before, you need to be allocated a username and temporary password. To obtain these contact the Study Group Adviser Barbara Ball at barbara@ludlowballs.force9.co.uk or the Treasurer Grace Wilkins at treasurer@u3ainludlow.org.uk

Also contact Barbara if you have any problems with using Beacon or you can contact the Secretary Sue Curthoys for help at suecurthoys@gmail.com

GETTING STARTED

- Make sure you have your username and password to hand.
- Open Beacon in your web browser by typing in <https://u3abeacon.org.uk>
- You will see three boxes to complete. Use the drop-down menu in the first box labelled **U3A** to find Ludlow and then click on it.
- In the next box enter your allocated **Username** (case sensitive).
- In the last box enter your temporary **Password** (case sensitive).
- On the next screen change the temporary password to one of your choice, and set up the personal questions as requested.
- You will now see another screen headed **Administration** with various subheadings and some words coloured blue. Any word in blue is an active link to further information.
- In the list headed **Groups** click on the word *Groups* which is coloured blue. You will now see the full list of active groups.
- You only have access to your own group's information.
- Click on the **title** of your group to access its records.

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WORKING WITH YOUR GROUP DATA

- Click on the **title** of your group to access its records.
- You should now see something like this:

The screenshot shows a 'Group Details' form with the following fields and options:

- Group:** Fun with Maths
- Faculty:** Discussion (dropdown), **Status:** Active (dropdown), **Max members:** 8
- Options:** Allow members to join on-line, Enable waiting list, Notify leader of changes
- When:** Second Monday afternoon monthly
- Normal start time:** 14:00, **End time:** 16:00, **Contact:** 01584879180
- Venue:** Members home (dropdown)
- Information:** Discussing mathematical problems and big ideas. No mathematical expertise needed.
- Notes:** (empty text area)
- Footer:** Group record created 11 Mar 2021 16:30; last changed 11 Mar 2021 17:30. Buttons: Save Record, Delete.

- These **Group Details** gives the information about the type of group, meeting place and time etc. This can be edited by you by clicking in each box. Don't forget to click on **Save Record** if you make any changes.
- Above this box there are three more headings in blue: **Schedule** **Members** **Ledger**.
- The only one you are likely to need is **Members**. Click on it to get a screen a bit like this (I have blacked out some personal information):

The screenshot shows the 'Group Members' section with a table of members and management options below it.

Select	Member No.	Name	Telephone	Mobile	Status	
<input type="checkbox"/>	667	Barbara Ball	01584 879180		Current	remove - make leader
<input type="checkbox"/>	666	Derek Ball	01584 879180		Current	Leader remove - cancel leader
<input type="checkbox"/>	1594	Pippa [blacked out]	[blacked out]		Current	remove - make leader
<input type="checkbox"/>	1809	Mark [blacked out]		[blacked out]	Current	remove - make leader
<input type="checkbox"/>	305	Gill [blacked out]	01584 [blacked out]		Current	remove - make leader
<input type="checkbox"/>	607	David [blacked out]	01584 [blacked out]		Current	remove - make leader
<input type="checkbox"/>	1304	Peter [blacked out]	01584 [blacked out]		Current	remove - make leader
<input type="checkbox"/>	133	Barry [blacked out]	01299 [blacked out]		Current	remove - make leader

Below the table, there are management options:

- Select:** (dropdown arrow)
- Do with selected:** Send E-mail (dropdown)
- 8 members (0 selected)**
- Add member by name:** - select member - (dropdown) Add
- Add member by membership number:** [text input] Separate numbers by commas Add

At the bottom, there are links: Home - Groups List

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- To remove a member from your group click on that member and then click on **remove** in the last column.
- To add a member by name scroll down to the bottom of the list of group members. To add by name just scroll through all the members' names, which are listed in alphabetical order in the drop-down menu, and click on the name you want to add. Then click on **Add**.
- Members can also be added using their membership number if you know it.
- These changes are automatically saved.
- To return to the main menu click on **Home** near the top of the screen.

SENDING AN EMAIL TO YOUR GROUP

- To send an email to everyone in the group click on **Select** (bottom left on the Group Members screen) and choose **Select All** in the drop-down menu.
- If you only want to contact some of your members click on the box at the left of the name of people you want to contact.
- Click on **Do with Selected** and then click on **Send E-mail**
- You will then see a screen like this:

Send E-mail

From: Barbara Ball <barbara@ludlowballs.force9.co.uk>

To: Barbara Ball <barbara@ludlowballs.force9.co.uk>
 Derek Ball <derek@ludlowballs.force9.co.uk>
 Pippa [redacted]
 Gill [redacted]
 David [redacted]
 Peter [redacted]
 Barry [redacted] 7 addressees

Tick to receive copy

Load standard message [dropdown]

Attachments: Choose files No file chosen

Subject: [text box]

[Rich text editor toolbar with icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, indent, outdent]

[Large text area for message content]

[Send] Save as standard message

To insert or edit website links, you must use the [link icon] tool above.
 Set URL to the full website address and Text to Display to the text that the user should click
 Do NOT display the website address
 Links for on-line applications and renewals are provided in tool under 'Link List'

You may personalise this message with the following tokens:

- #TITLE - member's details
- #FORENAME
- #SURNAME
- #FAM - familiar name
- #MEMNO - membership number
- #EMAIL
- #TELEPHONE
- #MOBILE
- #EMERGENCY - emergency contact
- #AFFILIATION
- #RENEW - renewal date
- #FEE - renewal fee
- #MEMCLASS - membership class
- #GIFTAID - gift aid date
- #ADDRESSH - address in 1 line
- #ADDRESSV - address over several lines
- #POSTCODE
- Partner's details...
- #PTITLE
- #PFORENAME
- #PSURNAME
- #PFAM - familiar name
- #PMEMNO - partner mem num
- #TODAY - today's date
- #U3ANAME - this U3A's name

Home

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- Write your message in the box. You may find it easier to write your message in Word or another word processor and then paste it into the box.
- The format of the message can be adjusted using the bar above the email box. There are several options in the drop-down menu labelled **Formats**. You need to experiment - it is not very user friendly.
- Give the email a title in the box labelled **Subject**.
- You may need to tick the box to receive a copy if you have not selected yourself.
- Then press the **Send** button at the bottom.
- Members of your group will be able to reply to you, but they will not see the replies that other members of the group send to you.
- To return to the main menu after sending your email click on **Home** near the top of the screen.

To send an attachment you already have stored in your computer:

- Click on the box labelled **Attachments** (above the **Subject** box) which contains the words *Choose File* and search in your computer for the attachment you want to send. Press *Open* and the name of the attachment will appear just below the **Attachments** box. Confusingly, the phrases *Choose File* and *No file chosen* do not disappear after you have chosen a file.