# 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 <a href="mailto:barbara@ludlowballs.force9.co.uk">barbara@ludlowballs.force9.co.uk</a> or the Treasurer Grace Wilkins at <a href="mailto:treasurer@u3ainludlow.org.uk">treasurer@u3ainludlow.org.uk</a>

Also contact Barbara if you have any problems with using Beacon or you can contact the Secretary Sue Curthoys for help at <a href="mailto:suecurthoys@gmail.com">suecurthoys@gmail.com</a>

### GETTING STARTED

- Make sure you have your username and password to hand.
- Open Beacon in your web browser by typing in <a href="https://u3abeacon.org.uk">https://u3abeacon.org.uk</a>
- 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.

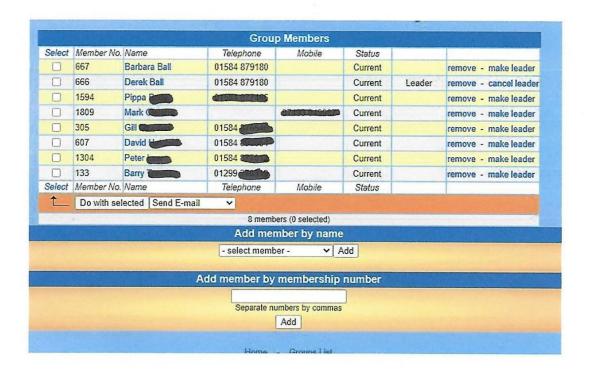
## Continued

## WORKING WITH YOUR GROUP DATA

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



- 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):

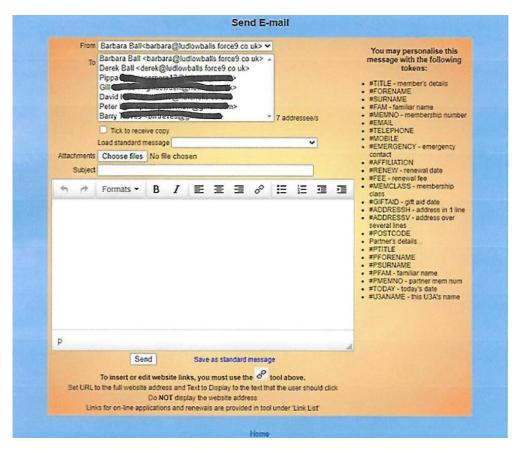


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- To remove a member from your group click on that member and then click on remove in the last column.
- To add a member by name scroll down to the bottom of the list of group members. To add by name just scroll through all the members' names, which 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:



#### Continued

- 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 <u>below</u> the Attachments box. Confusingly, the phrases Choose File and No file chosen do not disappear after you have chosen a file.