

Burton-on-Trent u3a

HOW TO USE BEACON

GDPR COMPLIANCE

Beacon is a system used to administer membership and groups. Please be aware of the following:

- Beacon access must be through a computer that is protected by
 - Anti-virus / malware software
 - Secure network – password protected system and password protected Wi-Fi
- Beacon access should not be made on computers used by the general public, e.g. those used in internet cafes.
- Ensure that anyone using Beacon on your behalf is also aware of these requirements.

LOGGING IN FOR THE FIRST TIME

If it is a new group, or if you are taking over as Group Leader of an existing group, contact the Beacon Administrator beacon@botu3a.org who will send you a username and temporary password.

To login for the first time:

1. Use the link below to get to the login page for Beacon
<https://u3abeacon.org.uk/password.php?logout&froml=1&relogin=1>
2. On the Administration page
 - Choose Burton-on-Trent from the u3a dropdown
 - Type in the Username you have been given for your group
 - Type in the temporary password you have been given (NB this is case sensitive, and you must type it in not cut and paste)
3. The first time you login you will be asked to change your password and possibly set the answer to a security question.

USING THE GOUPS MENU / RECORD

The Groups heading on the administration page has 4 sub-menus.

Clicking on the sub-menu Groups will display a list of all groups. Those that are blue are the ones to which you have access. Clicking on the group name will display its Group Record.

Group Record:

Details: for most groups this will be set up when the group first becomes active and only updated if there is a change of venue, day, start time or group contact person.

This holds basic information about the group.

Note:

'Max members', 'Enable waiting list', 'Allow members to join online' and 'Notify Co-ordinator' should be left unticked because these are not currently used / activated.

Please remember that changes to meeting dates, times and venues should be discussed with the Groups' Co-ordinator and, if necessary, agreed with the committee.

Schedule (optional)

This shows future meetings or events of the group. It is for your benefit only.

Members (the page you will use the most)

- **Adding a new member**

There are 2 ways to add members:

- By selecting a member's name from the 'Add member by name' dropdown list and pressing 'Add' or
- By entering the member's membership number under 'Add member by membership number'
- If the 'Max members' value has been reached, additional members are placed on a waiting list with a 'waiting since' date. Click 'join group' to make that member an ordinary member of the group. This may be done irrespective of whether the max members limit has been reached.

- **Remove members from a group**

There are 2 ways to remove members:

- Individually by clicking 'remove'
- Several at a time by ticking the members in the 'Select' column, selecting 'Remove Members' in the dropdown list below the table and pressing 'Do with selected'.

- **Using the select option to send a message to the whole group**

- At the bottom of the group members list click the blue select button and choose the 'Select All' option. Duplicate email addresses will be removed.
- Choose 'Send E-mail' from the 'Do with selected' dropdown and then click on 'Do with selected'. This will display the Send E-mail page.
- The 'From address is taken from your Member Record. If you are assigned to more than one group / committee role, all addresses will also be shown. Select the address you want to use.
- The list of addresses is displayed under 'To'. These cannot be changed here.
- Tick 'Tick' if you wish to receive a copy of the message
- A 'Subject' must be entered and then enter the message in the box below.
- Messages can be customised by inserting into the subject or message text any of the # tokens shown on the right of the page. When the message is sent, these tokens will be replaced by the corresponding information for the member to who the message is being sent.

- **Using the select option to create a group list**

- At the bottom of the group members list click on the blue select button and choose 'Select All'
- Choose 'Download Excel' or 'Download PDF' from the 'Send E-mail' dropdown and then click 'Do with selected'. Select the fields you would like included in the download. A group members list will be created that can then be printed, or if using Excel, prior editing is possible.

- **Using the select option to send a message to a subset or individual member of the group**

Click the select box to the left of each member you wish to send the message. From then on, the procedure is the same as that for sending a message to the whole group.

- **Adding a Group Leader**

A Group Leader must first be a member of the group, then click Make Leader. More than one Leader may be assigned to any group.

- **Removing a Group Leader**

Click Cancel Leader. The person will remain a member of the group.

If you need help contact the Groups' Co-ordinator groups@botu3a.org or the Beacon Administrator beacon@botu3a.org.

A link to the Beacon User Guide can be found at the bottom of the Home page. It is very comprehensive but also contains information which is not relevant to administering an interest group.