BEACON ADVICE FOR GROUP LEADERS (Revised February 2024)

Be aware, monthly maintenance work is carried out by the Beacon team, 10.30am, first Tuesday each month, when the system will be unavailable for a short time, usually no more than half an hour.

Beacon is an online system which you access via the internet. It is not downloaded as a programme to your computer. Once you have been set up on the system and used Beacon for the first time, you can save the website as a bookmark in your browser, or click this link: https://u3abeacon.org.uk/dashboard.php

The first time you use Beacon, you may be asked to accept cookies. Say **yes** to this as it enables Beacon to retain your preferences between visits. If request doesn't come up automatically, or you have not previously saved your preferences, click on **black triangle**, bottom left of screen. This should save you having to search for St Ives (Cambs) u3a each time, and will save your time-out if you extend it (see below). Your username and password won't be saved, unless you accept an invitation to do so from your own device. Note that you need to click on the black triangle **before** working on Beacon, and then don't click it again, or it will return to default settings and your preferences will be lost.

To extend the time-out, Go to Personal Preferences under Misc on Home page, type number of minutes into Session Timeout box (eg 60), click on Save Name Lists & Timeout All u3a Beacon systems are backed up daily by the national Beacon team, but in addition, our Beacon Administrator takes a weekly backup of our data so if you inadvertently delete anything from your group record, it should be possible to retrieve any data from the last 3 weeks. However, please note there is no "undo" button on Beacon, so it is not possible to reverse an action just taken!

Here is a quick reminder of the **basic instructions** issued when you were set up as a new Beacon user, but more tips have been added later in this document.

1) To access your group record, click on **Groups** under Groups heading

2) This will open a list of all groups

3) Find your group and click on the name in blue

4) This will open a new window with details of your group which you can amend if necessary. This is also where you can set up a **waiting list** (see detailed instructions for this, later in document). **Make sure you click on Save Record at bottom to save any changes you make.**

5) Note the other tabs in blue for Schedule, Members and Ledger that you can also access and update.

Click on the **Members** tab and a list of your members will open.

6) The name of any member not renewed will be in **red**. Most members will appear in red on 1st April, our membership renewal date. Do not be alarmed, as it may take our Treasurer/Membership Secretary several days, or even weeks, to process all the renewal subscriptions. If you have members still showing red after 1st May, please gently remind them their subscription is due. They have until 31st May to renew, after which they will be marked as lapsed and should not attend any group.

7) You can delete anyone from the list who is no longer a member by clicking on the word **remove** in right hand column.

8) To add a new member, go to the bottom of the screen where it says Add Member by Name. Click on down arrow and a list of all members will appear. Start to type surname and the list will go to approximately the right place. Click on the member you wish to add, and click on Add to right of name. Be aware, we have several members with the same surname, and even some with exactly the same forename and surname. If in doubt, check you have their correct membership number.

9) To change the person who is leader, first of all assign a new leader by clicking on **make leader** in right hand column. Then click on **cancel leader** to remove them as leader but don't click on **remove** unless you want to remove them from the group. If you accidentally remove someone from the group, just add them back again, as in 8) above. **NB: if you cancel yourself as leader, you will not be able to access the group record**. Contact our Beacon Administrator if you need to be reinstated.

10) **NB: Although you can change who is/is not a member of your group, you cannot change their contact details.** If any member advises you that they have changed email, phone number or address, please advise the Beacon Administrator (Joy Cooper), or Pat James (Treasurer/Membership Secretary). They will change the member record and your group information will automatically be updated.

When you have finished using Beacon, click on Home and then Log Out.

To easily get back into Beacon, you can click this link:

https://u3abeacon.org.uk/dashboard.php

or save it as a bookmark in your browser

If you have any problems using Beacon, please contact Joy Cooper at beaconadmstivesu3a@gmail.com (or tel 01480 493523)
For changes to member details, you can also contact Pat James at: TreasMemStIvesCambsu3a@outlook.com

There is also a Beacon User Guide you can access from the bottom of the Home page, and the page for group information is available at:
https://u3abeacon.zendesk.com/hc/en-gb/sections/360002083037-5-Groups

To send emails:

1) From your group list of names, tick any member(s) you wish to email. To test it out, you can tick your own name and try sending an email to yourself. If you want to email the whole group, click on the word *Select* (top left of table) and then on Select All. A tick will be put against all names.

2) Go to bottom of list, choose *Send Email* from drop down arrow, and click on the box to the left that says *Do with selected*. **NB: Don't click on Send Email, you have to click on the actual words 'Do with selected'.**

3) This opens a new window where you compose message, and you will see list of your chosen addressees displayed.

4) If you want to receive a copy of the message you send, tick box at top under Addressee. Emails are not saved or stored on Beacon, so it's a good idea to store copies on your own email system, perhaps in a separate folder if possible.

5) Once you are in the email screen, you can't change the list of addressees, you will need to go back to the group list to make a different selection. **NB: Once you have started to type a message, if you go out of the email screen before sending, the text just typed will not be saved and you will need to start the message again.**

6) When sending a long email, it's best to prepare in Word first to avoid losing text just done. From Word doc, use copy and paste to insert text into email. If mouse right click doesn't work, try Ctrl-V.

7) If you want to use the message again in future, you can save it as a Standard Message – in blue text at bottom of message box, next to word Send, but please put your group name at beginning of Message Name, so it will be easier to find.

8) If you want to personalise messages sent, you can type Dear #FAM and it will address it by known name, eg Dear John, or insert any other data fields listed on right hand side in same way. Use #FAM instead of #FORENAME to ensure "familiar" name is used, as some people's known name is different to their official forename.

9) You can attach docs where it says Attachments, by clicking on Choose File and selecting from a saved file on your computer.

10) Note the message at the bottom of the box about inserting web links. You will need to click on the 'chain' button at the top of the message screen. This will open another window. On the first line you copy the URL address, on the second line, Text to display, delete the URL address that automatically inserts, and give it a name, such as Link to Artwork, but not the URL address. Ignore the 3rd and 4th lines.

11) When you are happy with message, click *Send*

FURTHER TIPS FOR USING BEACON

1) **Email delivery**: Sometimes members report not having received a message sent via Beacon, but this is usually to do with settings in **their** email system. Please advise your members to add the Beacon address (noreply@u3abeacon.org.uk) to their safe sender list, to avoid messages being blocked or sent to junk. They may need to go to their email provider's website and access their account online to change settings there. Another way which may work is to add the Beacon address to list of contacts or email address book.
   Note: *you* can check delivery status for messages you have sent from the link to Email Delivery under Misc on the home page.

2) **To create a Waiting List:**
   1) On the Details tab that opens when you click on your group name, enter the maximum number you want in your group. If your group is now full, enter the number you currently have.
   2) Tick the little box underneath to enable Waiting List and **Save** the record.
   3) On the Members tab add any new members to the group who wish to join, in the usual way.
   4) Once the maximum number is reached, a date will be inserted in the Waiting column so you can see who has been waiting longest.
   5) If you wish to transfer a paper waiting list where members have been added at different dates, you can stagger the days you add them on Beacon (eg one at a time, each day for 5 days), to establish a priority order by date added.
   6) When an existing member advises they have left, remove them from the group by clicking on word '**remove'** in right hand column, and confirm Remove when prompted. Don't worry, this only removes them from your group, not from Beacon!
   7) You can then click on '**join group**' also in right hand column to enable the next person from the waiting list to join.
   8) Note tick boxes at top of Members list. If you **un**tick Waiting List, it will show only existing (joined) members, if you untick Joined Members, it will show only Waiting List. If you leave both ticked, it will show complete list.
   9) If you have a waiting list but also have members in the group who have not attended for some time, it is recommended that you email them to say there are others waiting and ask them to confirm if they intend to return to the group soon. There may be good reasons why they have not been able to attend recently, so common sense and discretion is advised here.

3) To extend the time-out:
Go to Personal Preferences under Misc on Home page, type number of minutes into Session Timeout box (eg 60), click on Save Name Lists & Timeout

4) To save your preferences:
Click on **black triangle**, bottom left of screen and accept cookies. This should save you having to search for St Ives (Cambs) u3a each time, and will save your time-out if you extend it (see above). Your username and password won't be saved, unless you accept an invitation to do so from your own device. Note that you need to click on the black triangle **before** working on Beacon, and then don't click it again, or it will return to default settings and your preferences will be lost.

5) To download an Excel list (eg for attendance record):
Go to the Members tab, Select All, and go to bottom of list.
Click on the down arrow at the right in the box where it starts 'Send Email'.
From drop down list, click on Download Excel, then click on 'Do with selected'.
A window will open where you can select which details you want included.
Click on 'Download' and the data will be exported to Excel (or possibly an equivalent programme if you use something else compatible).

6) Ledger facility:
There is a tab which opens a Ledger facility which some group leaders find useful for recording their group finances. It is very simple to use and fairly obvious once you are in it, but if you would like further advice, please contact our Beacon Administrator. It is completely separate from our main u3a accounts system on Beacon, managed by our Treasurer, so don't worry that you may mess anything up! You can also download the transaction record as an Excel document, should you wish to print it off.