

U3A Beacon System - help for new Users – Group Leaders

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

If you have been set up as a Group Leader within the Beacon system you should have received notification of your username and given a temporary password. You will be asked to change this password the first time you logon.

Please note that if you have been given access to the system, as say a group membership officer or a group administrator, you will be shown as a Joint leader. This is a system setting which cannot be changed. You will have the same access and privileges as a Group Leader.

As a Group Leader you will be able to do the activities outlined below:-

1. Access your Group's information and amend as necessary
 - a On the home screen click on [Groups](#) under the heading Groups
 - b Select your Group from the list, scrolling down as necessary. The group (s) you have access to will be shown in a different colour.
 - c A screen headed Group Details will appear. On this screen you can change any of the details.
 - d Just below the title of the group there are several options, if you select [Members](#) all the current members will be shown.

2. Add members by name or number
 - a Access your Group information as is in 1. above, selecting [Members](#)
 - b 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 which will take you to the bottom of the list.
 - c You will see there is a facility to add members by name or number. To add a member by name, click on the [select member](#) and scroll down the list. However a quick way is to start the typing surname in the box and it will take you to those surnames beginning with the letter, or word, you have typed, and where you can then select the appropriate member. Where we have members with the same name, you can see the address of the member chosen below the name as a check, before you click on [Add](#). The list displays members by surname alphabetically, but not then by first name alphabetically so for example you may have to scroll down all the Jones to find the right one.
 - d If you have many members to add and have their membership numbers, adding by number is the quickest way.

3. Contact Group Members by email

- a Once you have accessed your Group Members as above click the [Select](#) arrow at the top left hand side of the members list. A dropdown list appears, click on which ever choice is appropriate, in this case [Send E-mail](#).
- b Go to the bottom of the list (click the large black arrow on the top right hand side to get here quickly if necessary). At the bottom is [Do with selected](#) and next to it a box [Send E-mail](#). If you click on the arrow beside the words Send E-mail it gives several options. *(Even if you clicked [Select All](#) and then selected [Send E-mail](#) it will obviously only send emails to those with email addresses.)* After your choice click [Do with selected](#).
- c A new screen appears with a form with the From and To boxes filled in.
- d There is an option to 'Load standard message' but is unlikely you will use this as you will want to send an email relevant to your group. These are standard message generally used by the Committee.
- e Fill in Subject details and then type your email. Down the right hand side is a series of choices you can make to personalise your email. Probably the one you are most likely to use is, for example, Dear #FIRSTNAME which then will address your email to each member personally by their first name.
- f You will notice the Tick to receive copy is ticked. It will just send you one copy, however you can untick if you wish.
- g Press [Send](#) to send your emails

4. Download a list of Group Members in Excel or PDF

- a Follow the instructions in 3 a and b above.
- b Click on the arrow select [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. Print or save this list as you require.

If you need any further help please do not hesitate to contact Barbara Jones or Don Grundell.

If you wish to suggest any changes to these instructions please email communications@thornburyU3A.org.uk or send the email to Communications through the Beacon system.