

## **Brief guide for Group Leaders who wish to use Beacon.**

### General

Beacon is a database that stores information on a server run by u3a Central Office. Please note that Beacon is a different system to the WV u3a website.

Your account as a System User will be configured so that you can look at the data relevant to your group; also to add members to your group, remove members from the group and change who is group leader. You will not be able to see personal information of people who are not members of your group and you will not be able to see financial information.

### Logging In

Email the Beacon Administrator ([treasurer.wvu3a@gmail.com](mailto:treasurer.wvu3a@gmail.com)) for a password and username.

The opening screen at [www.u3abeacon.org.uk](http://www.u3abeacon.org.uk) allows you select your u3a (Washington Village), then enter your username and password. If you are using your own computer you can tick the box that allows Beacon to remember the u3a and username, but do not do this if you are using a public computer.

### Home Screen

This screen offers sections for Membership, Groups, Finance, Miscellaneous and Set-Up. Your account has been set up so that only the Groups section is available to you, along with an option to change your personal preferences.

There is a link at the bottom of the screen to open the latest version of the Beacon User Guide.

### Groups

From the Home screen, clicking on Groups will take you to a list of groups. You can scroll down the list to find your group or you can click on one of the short-cut letters to jump to the correct position in the list. There are also arrows at the top right / bottom right of the screen to jump to the bottom / top of the list.

If you click on the name of your group you will be taken to a screen giving further information. Note this will only work for groups where you are the leader.

### Details Screen

This shows information about your group. If you make changes you can click Save Record and the changes will be saved. You are strongly advised against clicking Delete.

Near the top of the screen are links to take you to Schedule, Members and Ledger pages. Schedule is unimportant as dates and times for Group sessions are on the WV u3a website. Ledger provides a simple spreadsheet for recording income and expenditure of the Group.

### Members

This gives a list of group members, comprising name, address, phone numbers and emergency contact information if available. Beacon also knows email addresses but they are not shown on this screen. You are required to treat all this information as confidential. Please read the short section on data protection at the end of this document.

### Add Member

At the bottom of the screen is a heading Add member by name. Below it is a drop-down for selecting the name of a new member and a button marked Add. Easy!

### Remove Group Member / Change Leader

At the right of each member's record are actions that can be performed on group members, allowing a member to be removed, made the leader or to cease being leader. Clicking on one of these options will have the appropriate effect. In the case of removing a member, you will be presented with a box requiring you to confirm or cancel the action. NOTE: depending on your screen resolution, it may be that the screen goes dark and clicking things doesn't work – don't panic, just scroll down until the box becomes visible then click Remove or Cancel as appropriate.

### Send Email

You may wish to send an email to all members of the group. To do this:

- Go to the bottom of the screen.
- Click on the word Select at the bottom of the left-hand column, then click E-mail only. A tick will appear in the left-hand column against every member who had email (you can manually untick individuals if the email is not applicable to them).

- Make sure the drop-down is showing Send E-mail then click on the button marked Do with selected. This will take you to the email screen.
- Compose the email.
  - If you use Beacon to send emails to multiple people, there are facilities to customise the email for different people. This uses a series of tokens listed at the right-hand side of the screen, e.g. Dear #TITLE #SURNAME, please confirm your phone number is #TELEPHONE.
  - You can compose the email within Beacon, or you can compose it in a word processor and then copy and paste it into Beacon.
  - Tick the 'Receive a copy' box if you want to keep a copy of the email.
- When you are ready, click the Send button. This will send the email to the selected members while maintaining confidentiality of email addresses.

Note that there may be members of your group who do not have email. At the left-hand end of the record for such members there will be an icon of an envelope with a red line through it. Please remember to make provision for any messages to reach those members who do not have email.

#### [Download Excel / PDF](#)

At the bottom of the screen you can change the drop-down from Send E-Mail to Download Excel or Download PDF. You can then select applicable members (either by ticking them individually or by using the Select All facility) and click Do with selected. You will be taken to a set of tick boxes allowing you to select what information to download and a button to Download the information (e.g. to create a register).

#### [Data Protection and Privacy Policies](#)

We may only store and use data in accordance with our Data Protection and Privacy Policies. You can read them on our website: [u3asites.org.uk/washington-village/home](http://u3asites.org.uk/washington-village/home). Click on Welcome at the top of the screen, then the link for Data Protection Policy.

You should treat all data as confidential. This means you should not give out contact details to anyone unless the subject has authorised this. You may wonder what to do if one member of the group contacts you and asks for details of another group member. The recommended procedure is for you to contact the subject and ask the subject to contact the person who made the enquiry.

**Mr Lyn Bossons**  
**Beacon Administrator**