

Beacon Document 1 (amended)

Instructions to Coordinator for adding membership lists to a named Group

(1) Go to <https://u3abeacon.org.uk>

You will see three boxes to complete.

Against **U3A** select '**South Lakes**' from drop down list. You will only need to do this once on any computer. Keep the box saying 'this is a private computer' ticked. Next time you go in, it will be already filled in. (Note if you remove cookies from that computer or start to use another web browser, this would not happen.)

Your user name is: XXXXX

Your password is: YYYYYY (these are set by Beacon, not its administrator here). Suggest you copy and paste these from these from my email. You will have to change the password once you have logged in once. You will also have to provide an answer to the question about your first school, for later use. (That question and answer can be changed later on as necessary.)

You are logged in for 20 mins. if you do nothing more.

You will see a **Menu**. The content of that is defined by our Administrator (Colin Edwards, SLU3A) and is allocated to you. It is the capabilities of these roles that can be adjusted as necessary. Your allocated role is as a **Group Leader (this actually refers to your role as 'Group Coordinator')**. If and when you give up the job the role is taken away from you and allocated to someone else's account.

{The Groups' Coordinator (Jenny Harrison) has already created a list of current **Groups** accordingly, together with their **Venues** (if applicable), **meeting times** and **regularity of meetings within your Group.**}

(2) All Coordinators: these details have been taken from the last Newsletter information. For our 'trial' the following things will need to be done by you, please. Let us know (Jenny Harrison and Colin Edwards) if you are not able to do any of the following please.

- a) **Click on your Group name** (in **blue**). If you have privileges to more than one group there will be blue links to each.
- b) Above the box showing the details of your group (that you can amend and save) you will see four possible options/links: **Details/Schedule/Members/Ledger**. '**Details**' appears black because that is the screen you are currently looking at; the remainder appear Blue.
First, your group's general details will need checking by you and amending as necessary. Add additional Information if this seems to be missing.

- c) **Click on 'Members'**. The list you see shows postal addresses and telephone numbers plus an indication of which of your members have email addresses recorded within Beacon.

You can use this listing to promote members to be group leader, demote them to the ranks, or remove them from group membership entirely.

You will need to check that the correct person(s) are listed as Group Leader (in the case of SLU3A this may be the Coordinator and a Deputy, if there is another person sharing the role.) We strongly recommend this joint responsibility, if possible.

- d) **Adding Members**. Use the arrows at the right-hand side of the screen to move to the bottom of your list or to return to the top.
At the bottom of the list you will see the option to "Add member by name". Use the drop-down list to view the names of all members and to select only the one you wish to add.

You can move around the list by typing the initial letter of their surname.

The new person's name will appear in your list positioned alphabetically by surname.

When you have selected one you will see their postal address beneath the box which may help you confirm you have the correct person.

Either reselect the correct person, or click ADD.

The entry will also show a date since when the person has been waiting (usually today) (*but only if you have enabled a waiting list on the Details screen*) together with [a blue link](#) offering the option to "Join group".

Click this to complete this operation.

- e) You will need to **add the maximum members of your group** to the general Information about your group, and to **update** this periodically.
- f) A final check:
- I. Add the frequency of the meetings, (e.g. monthly, third Friday morning)
 - II. Add the start /end time if applicable (the online clock gives you hour/minute options)
 - III. Provide an email and/or phone contact to one Coordinator
 - IV. Complete the Information section with brief additional details, if you wish.
 - V. Complete the Note section only if you wish. This section is for internal information only.

Finally – SAVE YOUR RECORD!

(3) Sending an email from you to one or more members of your group

- a) Select the members you want to send to (or select all of them by clicking on the word "Select" at the top or bottom of the first column and then choosing "Select All").
- b) Scroll to the bottom, select Send -mail from the drop down box and click on "Do with Selected".
- c) Construct the email text in the box then provided.

- d) For Advanced Users you can include Tokens that take items from the membership database and personalise each email that goes out, or you can paste text in from previously prepared or circulated material, or you can attach files viewable from your PC.

(4) You can LOG OUT of Beacon on the Home page.

Finally, finally, **please feedback*** on all your experiences in handling this part of Beacon, to

Jenny Harrison (harrison.tandj@yahoo.co.uk)

and

to Colin Edwards (beaconslu3a@gmail.com)

- ➔ We do need to know this facility meets your expectations well. Does having the group information and privileges allow you to interact with your members efficiently and helpfully? Have you set a Maximum number for your group (n.b. it is not always needed).
- ➔ If you have an existing 'waiting list' you may wish to indicate in the Information section just how it operates for your group.
- ➔ You may have recommendations for a future trial on Waiting Lists – e.g.,. how to promote someone from it to the main list. You may have recommendations for us about this particularly if the venue you
- ➔ Someone has already indicated to us that they might wish to generate group name lists and attendance registers. I can't answer that one for now, but ??

Your responses would be really helpful to the Committee during 2019.