

## The Beacon System

Below are notes on how to use Beacon. If you prefer watch a video showing you how to use Beacon the links below will help.

Logging in to Beacon [https://youtu.be/6S-AXug\\_B74](https://youtu.be/6S-AXug_B74)

Adding members to Beacon <https://youtu.be/i9L-peXEduo>

Sending emails through Beacon <https://youtu.be/aaJnsGclaac>

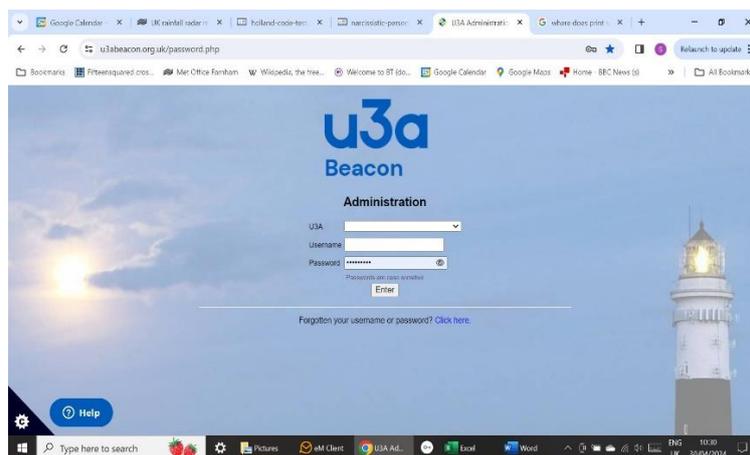
### 1. Introduction

As a group leader or contact you have been granted access to the groups module of the Beacon System. This system will allow you to generate and maintain your group membership list, download and/or print certain membership data and send GDPR compliant emails to your group members.

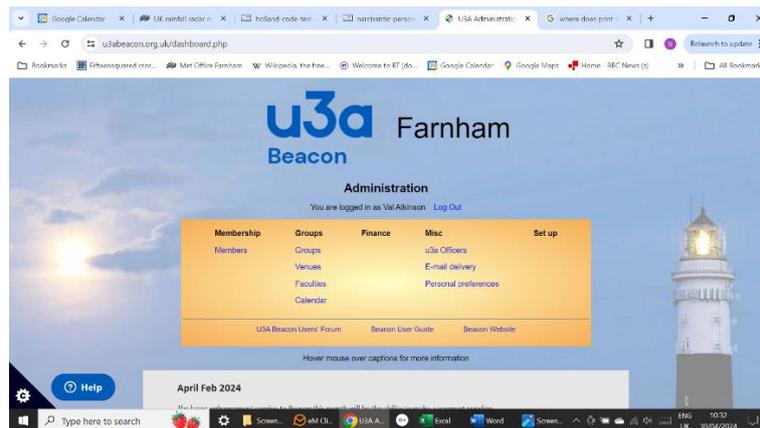
Beacon is hosted centrally by the Third Age Trust (the national u3a) and is accessed via the internet; the best way to access Beacon is by searching for “u3a Administration” using your internet browser then saving the link to “favourites”.

### 2. Login

When you login for the first time the system will prompt you for your temporary password, then ask you to create a new password. The **login** screen looks like this.



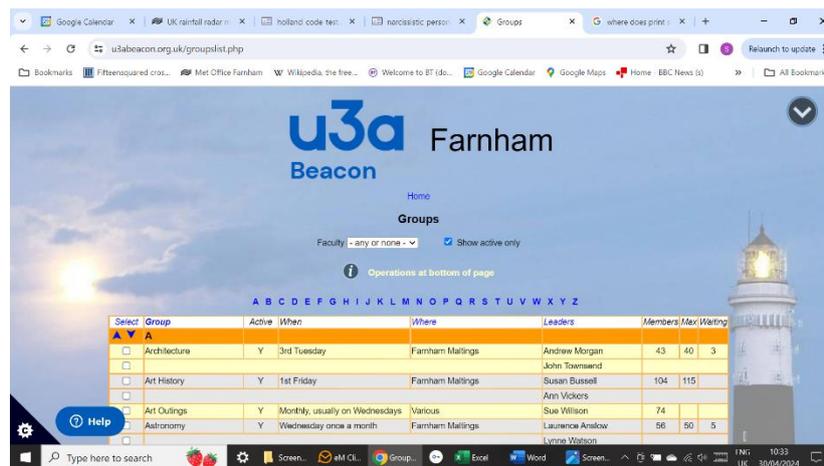
To find Farnham u3a you can click the down arrow to the right of the top bar, and scroll down. Or you can type F into the top bar, which will get there more quickly. Type in your username and password and click on 'Enter'. This will take you to the screen below, the **Home** screen for **Farnham u3a**.



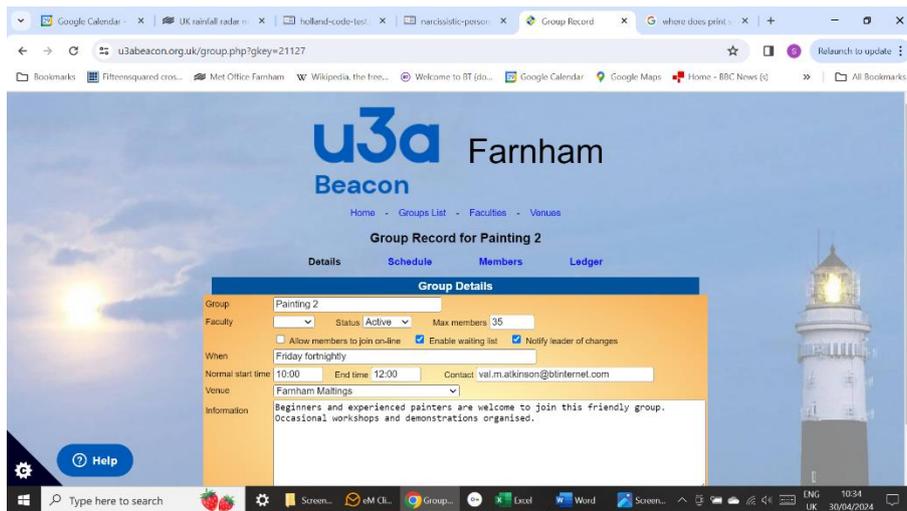
Most of this screen you can ignore – though you may want to look at the Beacon User Guide (centre bottom of the yellow box) if these notes don't tell you everything you want to do!).

### 3. Finding your group

On the **Home screen for Farnham u3a** above, click on the blue Groups label under the **Groups** heading. This will bring up a full list of the Farnham u3a groups, as below.

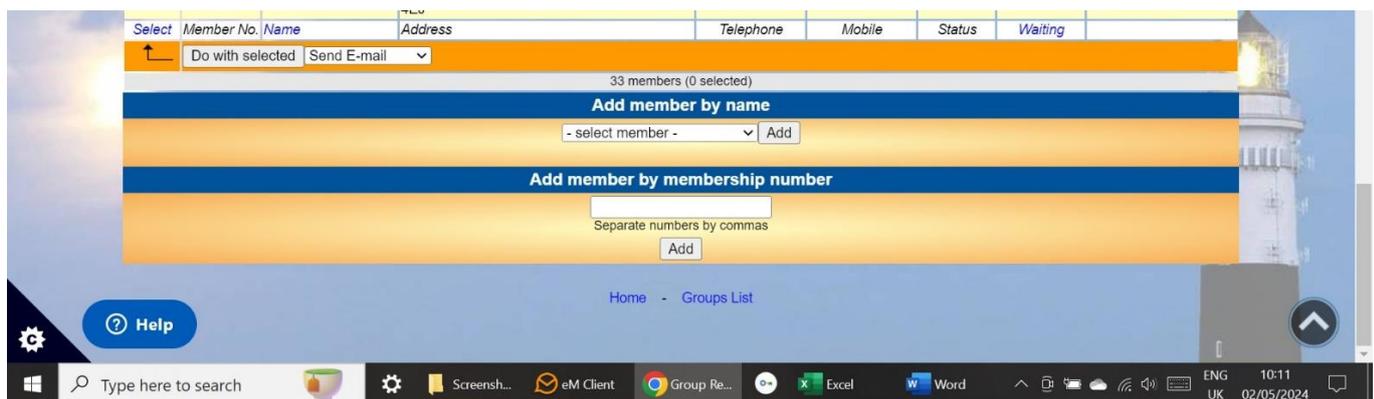


Scroll down to find your group. Groups which you have Beacon access to will be in blue. Click on the required group to bring up the **Group Record**, as in the example below.



#### 4. Adding (and deleting) members

To see the members in your group, click on **members**, in blue, third one along between the **Group Record** title and the yellow box. This will bring up a blank form for a new group, or a list of members for an existing group. The bottom of this screen is shown below.



To add members, the quickest way is to type in the membership number in the lower box – **Add member by membership number** – then click on **Add**. Or you can use the **Add member by name** box and scroll with the down arrow to find the member to add.

To delete a member, find that member's details. The column on the right says 'remove - make leader'. Click on **remove** to remove a member from the list. The screen greys out and you may need to scroll down to the end of the list of members to see the box asking you to confirm or cancel the removal.

#### 5. Waiting lists

In the **Group Record** window, under the group name, on the right is a box labelled **Max members**. If this is completed, members added after the maximum is reached will be put onto the waiting list. The maximum should be set initially at the room capacity though you may want to set it slightly higher as not all members will turn up each time.

## 6. Sending emails

Sending an email via Beacon means that members cannot see each other's details. To send an email to the group go to the bottom of the list of members. On the left, in blue italics, is a box labelled **Select**. Click on this box, then click on **Select All** to select all your members. Or you can select members individually by checking the box next to their name. Make sure you also send the email to yourself, so you know what you've sent, as Beacon does not keep a copy of sent emails. This will happen automatically if you are on the list of group members. Otherwise, tick the box above your typed email "Tick to receive a copy".

Click on **Do with selected** and the email screen comes up

In the **From** box at the top you can select whether to use your personal email address or your group email address – replies will go to the selected address.

Below the list of recipients is a box saying **Choose Files** where you can add attachments. The name of the file appears under the "Choose files" box above your email. Press the x next to it if you want to deselect it.

Type in the subject of your email and then type your email in the box.

You can start Dear #FORENAME and members will receive an email starting Dear Val or whatever. But sometimes this is confusing as members do not realise that it is a group email, so it may be best to just say Dear All, or to make it clear that this is a group email.

When you finish typing, press **Send** at the bottom of the white box.

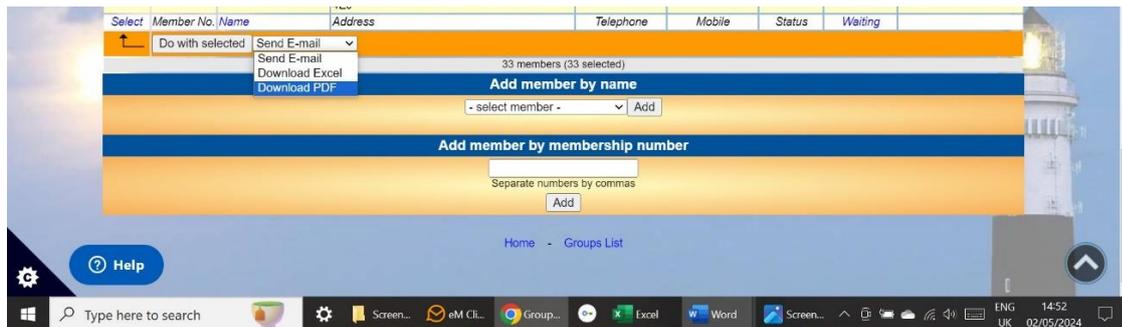
When you send an email via Beacon it is headed 'No Reply Beacon', but people can press reply and it will come to your email, so it might be worth saying they can just select 'reply' in your email.

## 7. Checking email delivery

You can check who you have sent an email to and if it has been delivered by going right back to the **Home screen for Farnham u3a**. You may wish to do this if you get an 'undelivered' message. Click on **email delivery** in blue, on the right, to see who the email was sent to and when it was delivered. Any errors will show up here – if an email address is undeliverable to, you may need to check it with the member concerned.

## 8. Downloading membership data

If you want to download membership data – for example, to print off your own membership forms, you can do this from the **Group Record** window.



Select names as for sending emails. Alter the default **Send E-mail** by clicking the down arrow in this box, then clicking **Download Excel**. To download, click **Do with selected**. This will reveal the window below.



Names will always be downloaded. Click on the other fields you want to download, then click **Download**.

***When you have finished, you should return to the Home screen and log out. If you need further help you can look at the help on Beacon or contact [groups@farnhamu3a.org.uk](mailto:groups@farnhamu3a.org.uk)***