

Brief guide for Group Leaders who wish to use Beacon.

General

Beacon is a database for managing the membership and finances of WVu3a. Please note that Beacon is a different online system to the WV u3a website, which mainly advertises the Group activities and other events.

Logging In

- Email the Beacon Administrator (beaconad.wvu3a@gmail.com) and request a password and username.
- The opening (Home) screen at 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 links in the [Groups](#) section, a link to the [Ledger \(by Group\)](#), and 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, which gives more detailed guidance on how to use Beacon.

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. 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 or deputy leader.

Details Screen

This shows information about your Group. If you make changes, you can click [Save Record](#) and the changes will be saved.

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. You can also ignore Ledger as you can check your income and expenditure for the current financial year (if relevant) using the [Ledger \(by Group\)](#) link on the [Home](#) screen. Please note that the balance shown on the Ledger does not include the accrued balance from previous years. The Treasurer will keep you updated about your accrued balance once a month.

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.

Add Member

Go to your [Group](#) page, select [Members](#), and 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](#). In the 'Select' column on the left-hand side of the page, click the square box of the name of the person you want to add, then click 'Add'. Easy!

Remove Group Member / Change Leader

At the right of each member's name are actions that allow a member to be removed, be 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.

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 has email (you can manually untick individuals if the email is not applicable to them).

- 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 personalise the email for different people. This uses a series of 'tokens' listed at the right-hand side of the screen, e.g. '#fam' will enter the recipient's familiar (preferred first name) name when the email is sent. Please use this token unless you are only emailing one or two members. Not only does this personalise the message, it also avoids the recipients email provider rejecting what might be regarded as bulk spam email. Please indicate at the top of the message who the message has been sent to (e.g. 'To members of the xxx Group'), as recipients are not listed, for data protection reasons.
 - A long message could be composed in a word processor and then copied and pasted into the email on Beacon.
 - Tick the '[Receive a copy](#)' box if you want to keep a copy of the email.
 - The [Browse](#) button enables a file on your computer to be attached to the message.
- When you are ready, click the [Send](#) button.
- 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. In addition, there may be members of your group who belong to a neighbouring u3a so they will not appear in the members list. Please remember to contact them separately.

[Download Excel / PDF](#)

At the bottom of the [Members](#) 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). You can add members of the Group who are from other u3as to this spreadsheet.

[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: washingtonvillage.u3asite.uk. Click on Documents on the 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