

## **4. Using Beacon for group management**

### **4.1 Introduction**

This document is intended to help co-ordinators learn how to use the on-line database Beacon for different aspects of group management.

Beacon was designed by u3as, for u3as, to manage membership, groups and finances. In particular, it provides group co-ordinators with features on membership management, calendars of events (ie activities and meetings), venues, group financial ledgers and easy communication with group members. It also enables Chesterfield u3a to comply with all legal data privacy and protection requirements, brings security for your records and gives easy continuity when a new co-ordinator takes over.

There is no need to install separate software. All interaction with Beacon takes place through the web browser of your phone, tablet or computer.

### **4.2 Getting started**

New co-ordinators, or existing co-ordinators not yet using the system, should first contact the Beacon Administrator, who will allocate them a username and password to enable them to gain access to the Groups section of Beacon. The username will be different to the username for their personal membership transactions, but the same password can be used if desired.

If a new group is being established, or your group is not already on the database, then the Beacon Administrator will also **create** a record for the group so that, once your group is about to become active, you can log in and add information about the group and its members, as set out in the following sections.

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#### 4.3 Logging on to Beacon

Go to <https://www.u3abeacon.org.uk/> to log in as a Group Coordinator. (NB This is different from the log-in process you use to renew your membership or change your personal details).

You will see the Log-in screen:

Select Chesterfield u3a from the drop-down menu and enter the username and password you have been allocated by the Beacon Administrator. (The first time you log in you will be asked to change the password on entry to the site, so it is worth thinking about a 'new' password before you log in). Please don't save the password on your computer. Click 'Enter'.

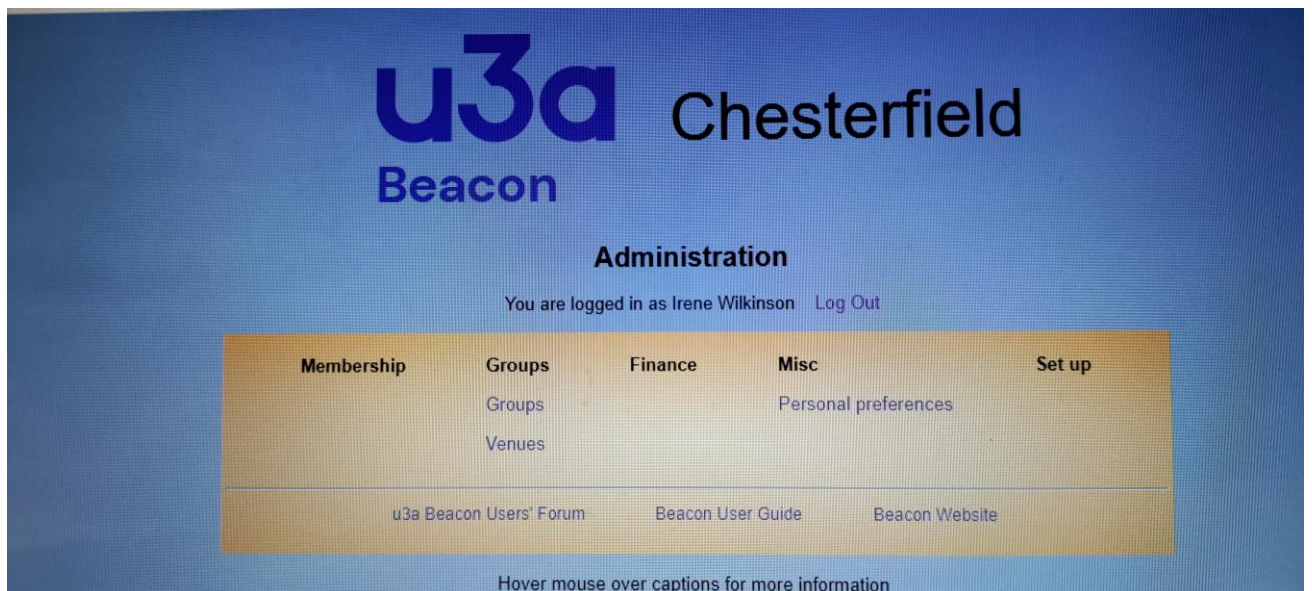
You are allowed three attempts to log in. If the third try fails, another log-in attempt will not be accepted for 15 minutes. You may avoid this delay by closing and reopening your browser. If you continue to be unable to log in, seek the assistance of the Beacon Administrator. Usernames and passwords are case-sensitive so make sure that you are not inadvertently in Caps Lock mode. Passwords should be typed, not pasted.

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Once you have successfully logged in, you will see the following Beacon *Home* screen. The text in blue indicates the information on Beacon which you have permission to access.

*Home screen*

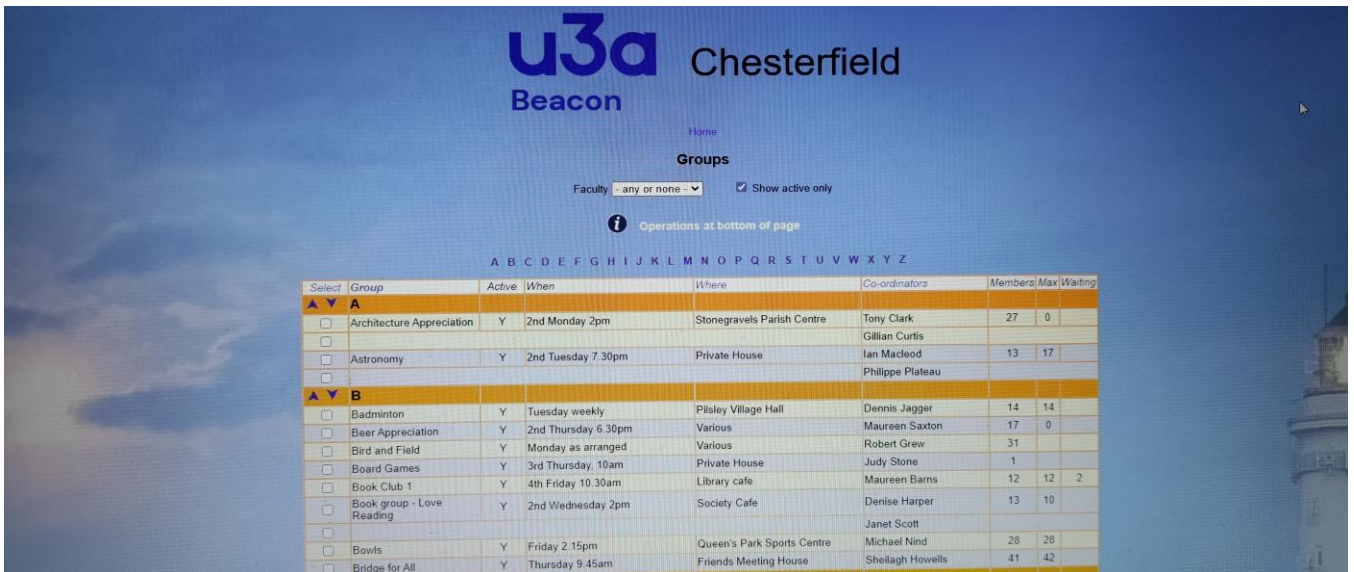


#### 4.4 Entering and editing details of the group

4.4.1 On the Home screen, select the option "Groups". You will be presented with the following Groups List screen containing, in alphabetical order, all Chesterfield u3a's current groups.

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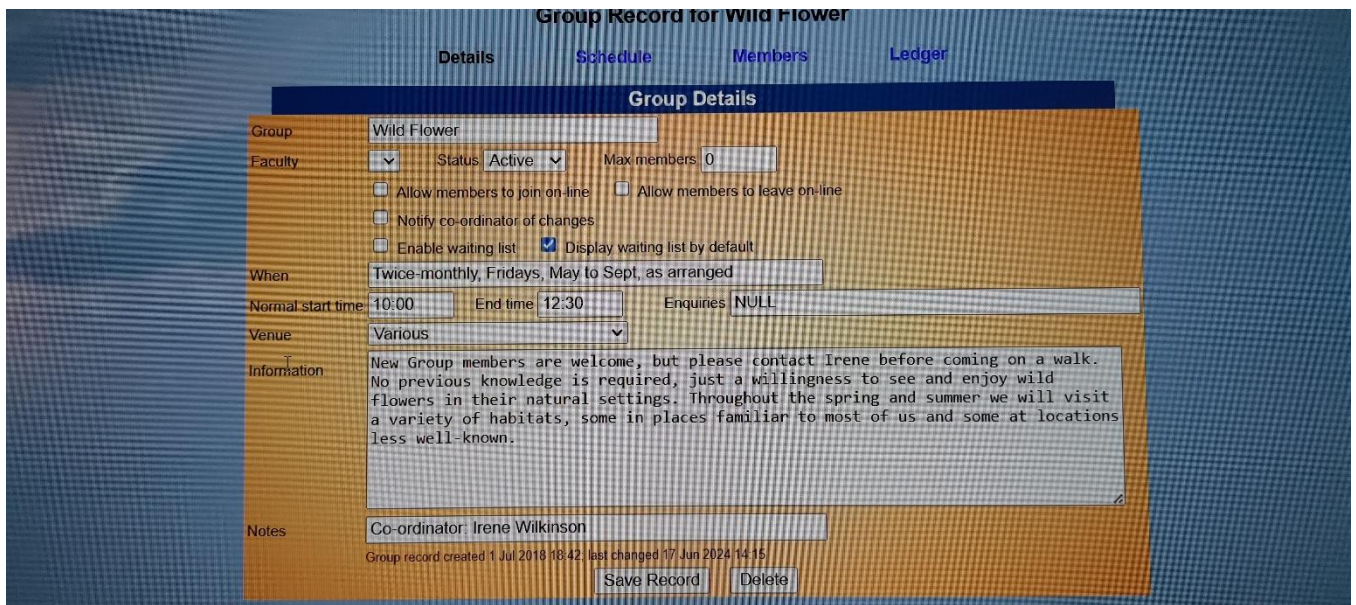


Groups List screen

The name of your Group will be in blue text. Click on this to open the Group Record screen (Details page), an example of which is shown below:

### 4.4.2 The Group Record Details page

Group Record screen



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The *Details* page of your own Group Record will look similar to the screen on the previous page, but will be blank until you enter information. The Group Record has four pages / sections:

- a) Details: for information about the group, such as what it does, how often and where it meets etc;
- b) Schedule: for dates of forthcoming meetings;
- c) Members: list of all group members;
- d) Ledger: for financial transaction of the group (*but we don't use this*)

If you want to enter or edit anything except the venue, put your cursor in the relevant box and type in the relevant information. *However please leave the three tick boxes alone.*

To enter or change a venue, click on the small "Down Arrow" at the side of the Venue box and a list of venues will appear – choose the correct one. *NB If the place you meet does not appear in that list, you will need to send an email to the Beacon Administrator with details of your venue, the address and if possible who to contact to book it. The Beacon Administrator will then add it to the Venues list, so that the next time you enter Beacon it will be there on the list for you to choose.*

When you have finished click "Save Record".

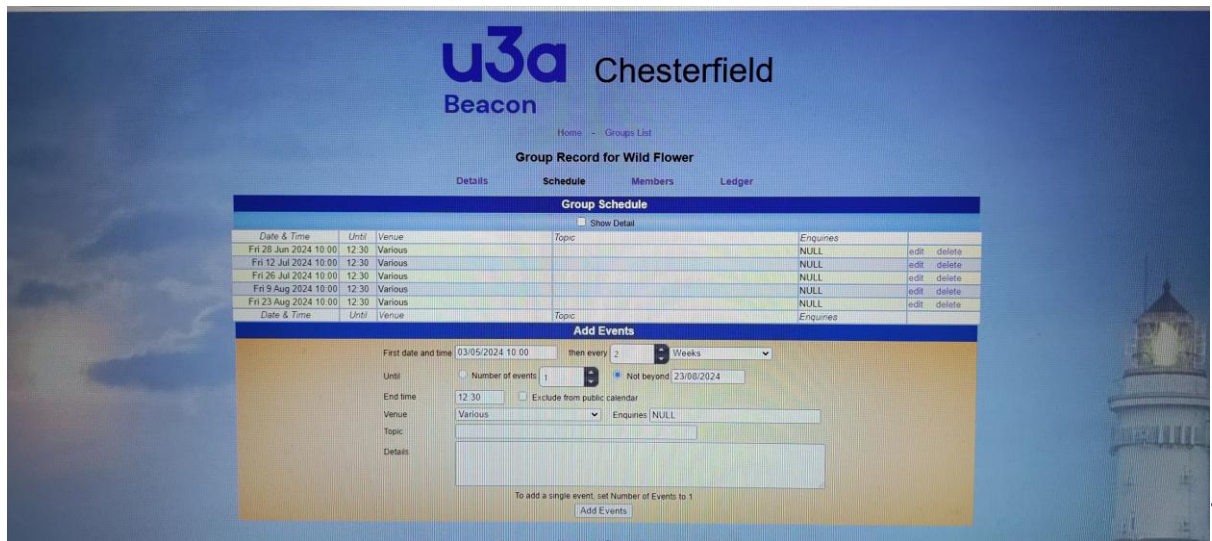
#### 4.4.3 The Group Record Schedule page

If you want to add information about timing and dates of group meetings, click on the word 'Schedule' on the Details page to see the next screen.

This page will already show future meeting dates for your group if you have entered details of the days and times of meetings on the Details page. If you want to add any other events, put the details in the relevant boxes and click on 'Add events'. (*NB 'events' is the term used on Beacon for regular group meetings as well as events*).

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### Group Schedule screen

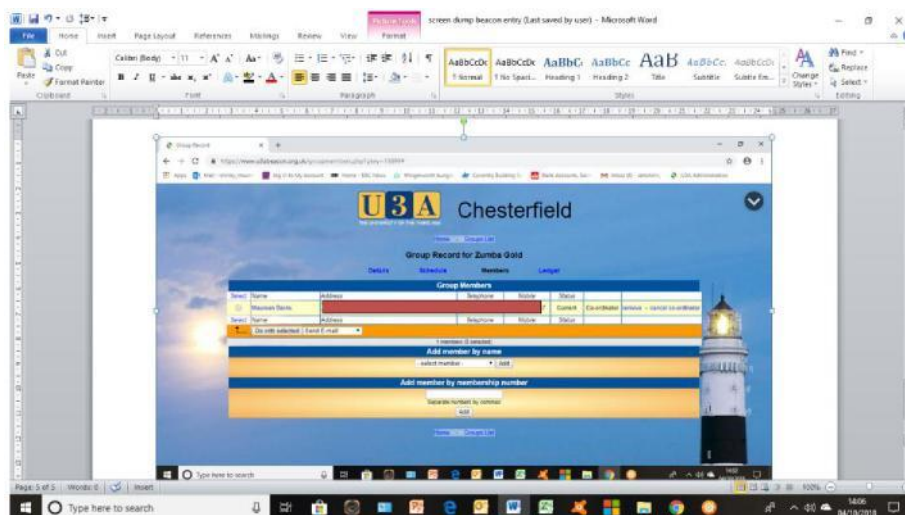


4.4.4

### 4.4.4 The Members List page

If you want to add or remove members from the List, click on the word 'Members' on the Details page and you will be presented with the Members List screen; the following example has the details of a group member (who also happens to be the Group Co-ordinator) blanked out.

### Members List screen



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### **4.5 Adding and removing group members**

4.5.1 **To add a member**, go down to the two options at the bottom of the Members sub-page screen “Add a Member by Name” or “Add a Member by Membership Number”. To find a member’s name click on the “Down Arrow” at the side of the option and scroll through the list of all members until the correct name appears in the box. To find a member using their membership number, type the correct Membership number in the “Number” box.

When you have selected the correct member, click on “Add”. The member’s name and details should then appear in your group members list.

*NB 1: If a name does not appear in the drop down list, then, if you have entered the details accurately, it means that they have either not yet joined Chesterfield u3a or have not renewed their membership and you will have to talk to them.*

*NB 2: If, early in the following year, their names change from blue to red in your list, this will indicate they have not renewed their membership and a gentle reminder might be helpful. So, you can automatically see who is, and who is not, a paid up member without checking their membership cards.*

4.5.2 **To remove a member** from your group simply choose the “remove” option on the right hand side against their name and details. You will be asked to confirm your selection.

*NB: If a member has not renewed their membership, their information will appear in red for a period of grace of up to 2 months and will then be deleted by the Membership Secretary..*

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#### 4.6 Emailing to Group Members

Using Beacon to email one, some or all of your group members means that there is no chance that their email address becomes visible to other group members and there is no need to keep their contact details on your own devices.

4.5.1 On the Group Members Record go to the bottom of the left hand column, then:

- Put your cursor over the word "Select";
- You will be shown a Menu with options;
- Select "Email only" – this will select all of your members with an email address, then:
  - Use the down arrow beside the third box to choose "Send email".
  - Click on "Do with Selected" in the second box.
  - An email template will appear. Type in your message and then "send". When this is sent, you will also receive a copy in your own email account, as will everyone on the list, but they won't see each other's details.

*NB: Some members may not have an email address on Beacon and will need to be contacted by other means (a picture of an envelope with a red strike through appears against the names of those who don't). You cannot add an email address on their behalf, but you could, if you wish, ask them to notify the Membership Secretary to update their details by adding an email address.*

***When you have finished your session on Beacon, click on RETURN to Beacon HOME to log out.***

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**Those of you who are more confident with a computer may find the next two sections useful. If you would like to use them but lack knowledge or confidence, training and advice is available – contact the Beacon Administrator.**

**Remember that data privacy and protection means that co-ordinators must take security precautions if they hold members' personal contact details on any or all of their electronic devices.**

#### 4.7. Exporting your Members list to a pdf

A pdf is a protected file containing a list of group members' names which would be downloaded into your computer; you won't be able to edit it but you will be able to print it off to use as a register.

On the Group Members List screen, put your cursor over "Select" at the bottom of the left-hand column:

1. A menu will appear, choose "Select All";
2. Use the down arrow beside the third box to choose "Download to pdf";
3. Click on "Do with Selected" in the middle box;
4. You will be presented with a check list of information to include (see next page); we recommend that you DO NOT tick any of the boxes unless you think items on the list are essential;
5. Click on "Download" and a download file will appear in the bottom left of the screen;
6. Click on it and it will automatically open in your computer. You can print the file and save the pdf in a relevant place on your computer. NOTE this file does not open up in a Word Processor and cannot be edited.
7. REMEMBER to return to Beacon and "Log Out" from top menu, right hand side.

***When you have finished your session on Beacon, click on RETURN to Beacon HOME to log out.***

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#### 4.8. Exporting your members list to a spreadsheet

On the Group Members Record put your cursor over "Select" at the bottom of the right hand column:

1. A menu will appear choose "Select All";
2. Using the down arrow at the side of the third box choose "Download to Excel";
3. Click on "Do with Selected" in the middle box;
4. You will be presented with a check list of information to include. We recommend that you DO NOT tick any of the boxes unless you think items on the list are essential;
5. Click on "Download" and you will see a download file appear in the bottom left corner of your screen;
6. Click on it and it will open in your Spreadsheet software with the list of members inserted. *Note: It will be presented as a protected file and if you want to print or edit it you will need to "Enable Editing";*

***When you have finished your session on Beacon, click on RETURN to Beacon HOME to log out.***

For advice and help with any aspect of Beacon, please contact our Beacon Administrator (contact details are in the Newsletter and on the website.) You can also get further information about Beacon from the national u3a Beacon website <https://beacon.u3a.org.uk/>.

***It is important that you know Beacon maintains a log of what you do and this can be viewed by the Beacon Administrator. If you make a mistake it will be fixable.***