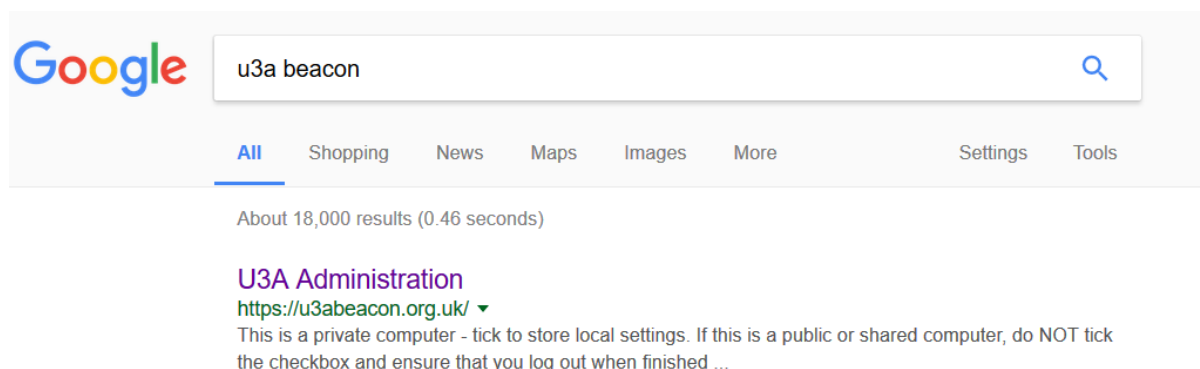


Group Leader Beacon Guidelines

ACCESSING THE U3A BEACON WEBSITE

Link - <https://u3abeacon.org.uk/password.php> or search



LOG IN

u3a name – Yate & Sodbury District from drop down list (type Y)

Username – xxxxxx

Password – xxxx (you should change your password as soon as possible and not share it with anyone else)

I have set your first school to – School – you may be asked for this you can change it, using personnel preferences in Beacon.

If you have a problem logging in, please contact the Beacon Administrator via the contact page on the Yate & Sodbury u3a website. If you need to have your password reset a please contact the Beacon Administrator via the contact page of the website. You must never share your Beacon password with anyone.

Note: Beacon development have added cookies to the system. You should accept optional cookies as this will retain some of your preferences. To see the cookie information, click on the 'cog wheel' in the bottom left-hand corner of the main menu screen.

MENU

The menu shows the options available to group leaders.

The Beacon User Guide option in the centre at the bottom of the screen will take you to the guide that comes with the system. There is a section on Groups.

Groups – will display the Groups List

Venues – will display a list of Venues, maintained by the Group Co-ordinators

Faculties – this is used for group categories, maintained by the Group Co-ordinators

Calendar – will display meetings entered in the system

Email Delivery – will show status of any emails sent by you.

Personal preferences – passwords and security information can be changed here.

Log Out button near top of screen to exit the system

GROUPS LIST

Home button, where a screen has a 'Home' button at the top, advise using this instead of the back arrow to go back to the menu. The back arrow will sometimes drop out of the system instead of returning to the previous screen.

Select your group by clicking on the Group Name from the Group List to display Group Details screen.

GROUP DETAIL

Update your group details - venue, day, time, waiting list, contact (phone or email), notes.

GROUP MEMBERS TAB

Add or Remove members of your group, if a member of your group is not on the system, they are not a u3a member. After 1st June the name of any member who has not renewed will be shown in red or will have a status of 'Lapsed' instead of 'Current'.

If you wish to delegate the administration of your group within Beacon you can make a second person a co-leader, providing they have been added as a user with group access to the system. Please contact the Beacon Administrator via the contact page of our website to request a new user.

SEND AN EMAIL

Select members (use 'Select' button at top or bottom of the member list or select individually by ticking the select box), click '**Do with selected**' to display the email screen.

To receive a copy of the email you are sending tick the 'Receive a Copy' box.

To add an attachment, click the 'Browse' button which will display your folders for you to select a file. Enter email text or cut and paste text from a saved document.

To personalise the Email you can use a Token, these have to be written exactly as shown down the righthand side. (e.g. to add a first name type #FORENAME). Click the 'Send' button at the bottom of the screen to send the email.

Click 'Home' to go back to menu screen, click '**Email Delivery**' option to check if email has been delivered to all members successfully (this will take a few minutes).

GROUP SCHEDULE TAB

Meetings can be added these will then appear on the calendar (accessed from the main menu screen).

GROUP LEDGER TAB

If your group has any transactions to record then these should be entered onto the ledger for the current financial year. We advise Group Leaders to enter their transactions regularly throughout the year. In and out amounts have to be entered as separate transactions.

The Yate &Sodbury u3a Treasurer will be able to review the group statements at the end of the financial year instead of asking groups for paper returns.

Please ensure all transactions for the financial year are entered by the end of March.

OTHER INFORMATION

Venues – a list of venues used by groups. If you change your venue but it is not on the list contact your Group Co-ordinator.

Audit log – there is a log of all actions which can be viewed by those users with admin access.

Contact your Group Co-ordinator via the Executive page of our website:

<https://yate-sodbury.u3asite.uk/executive-meetings/>