

Evesham and District u3a – Beacon Step by Step

This document has been written to help you in keeping the u3a Beacon administration system up to date. The system is designed to be easy to use and has been purpose built for use by u3as nationally, taking into consideration the concerns that Group Leaders are likely to have. It is important for the overall management of the u3a that any Group changes (timing and venue, members leaving, joining, financial records in particular) are recorded on Beacon as soon as possible. (Please note – changes on Beacon are not currently fed through to the u3a website so you may need to reflect changes made on Beacon on the relevant group web page too. The web team are always happy to help with this). This document covers:

1. Getting in to Beacon ('logging on')
2. Updating Group Details
3. Updating Group Members
4. Updating Finance Records
5. Sending emails to Group Members

1. Getting in to Beacon

From the u3a website <https://evesham.u3asite.uk>

- Select the Members Info tab,
- Scroll down to the heading of Beacon, click on the words Beacon Login,

Alternatively go direct to <https://u3abeacon.org.uk>

- Click on 'Accept cookies',
- For u3a select 'Evesham' from the drop down list and put your user name and password (provided by the Beacon Administrator) into the relevant boxes.
- Click on 'Enter'.

NB If you save the page you are now on by bookmarking or marking it as a favourite you will never have to go through the above process again! The next time just click on Favourites or Bookmark depending on your computer / device.

2. Updating Group Details

As a general rule, on Beacon everything that is coloured blue you can click on and there is some more detail behind. Permissions are managed so that you are only able to update your Group. **For Member detail changes please contact the Membership Secretary.**

Under the Groups heading:

- Click on the blue 'Groups' and a list of all the active groups will appear.

- Click on your group name (which should be blue) and you will get to the Group Details – you should not need to do this very often but you are able to overwrite any of the details here
- Always click on 'Save Record' (Please amend your website page to match any changes made here, or ask the website team to do this).

3. Updating Group Members

- Click on the blue 'Members' which is above the Group Details and you will get the current list of group members.
- If a member has left your group, then you can delete a group members name by clicking on the blue 'remove' at the end of the row with their name on.
- If you want to make someone else a Group Leader so that they can access this screen click on Make Leader.

NB DO NOT Click on 'Remove Leader' by your own name as you will not be able to get back in without contacting the Beacon Administrator!

- To add a new member to your Group go to the bottom of the screen to 'Add Member by name' – the dropdown list has all current u3a members to choose from but you can speed things up by typing the first letters of their surname into the box and all members with that surname will appear.
- When you have the correct person click on 'Add'

NB if the member has not renewed their membership subscription in the renewal period of November and December their names will be coloured red and if they do not renew by the end of December their names will disappear from your Group and they will no longer be a member of the u3a and therefore not covered by our insurance.

- As an alternative to the above, you may prefer to type the relevant membership number, with commas between each digit, into the 'Add member by membership number' box and clicking on Add.

NOTE : at any point you can go back to the start by clicking on the blue 'Home' at the top of the page and following the instructions again.

4. Updating Finance Records

- Click on the blue 'Ledger' which is above the Members details. This will show you any recorded financial transactions for your Group in the current financial year which runs from April to March. Brought forward balances are automatically calculated on 1st April each year from the previous brought forward balance plus any 'ins' less any 'outs' for the year.
- To add a new transaction go to 'Add transaction' and put the date, payee and detail in the relevant boxes. Today's date is automatically entered but you can change this.

- For any item of spend put the amount into the 'out' box,
- For any money received put the amount into the 'in' box and then click on 'Save'.
- You can download a copy of the transactions to date into a spreadsheet (only if your device has EXCEL on it) at any time by clicking on 'Download Excel'. You can look at previous years by changing the dates in the box at the top.

5. **Sending Emails to Group Members**

- Click on the blue 'Members' above the details box.
- Select the members you want to email by ticking the 'select' box to the left of their name.(If they have not given the u3a an email address then there will be an envelope with a cross through it and you will not be able to send to these people).
- If you want to select all who are contactable by email, click on the blue 'select' at the top left and you can then click on 'email only'. The ticks will automatically appear next to the relevant names.
- Click on 'do with selected' at the bottom of the page on the left and a box will appear for you to type your email into.
- Put the subject of your email into the 'subject' box and write your email.
- You can add attachments from your device by clicking on 'choose files' and selecting the relevant file.
- You can also add a weblink by following the instructions at the bottom of the page. Click on 'send' and your typed email will be sent to all the selected recipients.

**PLEASE AT ALL TIMES REMEMBER YOUR RESPONSIBILITIES UNDER GDPR
AND TAKE CARE WITH USE OF PERSONAL DATA**