## **U3A Beacon System : Getting Started – Conveners**

## Welcome to Beacon.

You have now been set up as a System user on the new Cardiff U3A Beacon System as a Convener:

Your Username is your initial and surname e.g. xwood (all lower case)

Your Temporary password is hX\_35^Bx

You will be asked to change it the first time that you login

## **BASICS**:

You will now be able to do the following: -

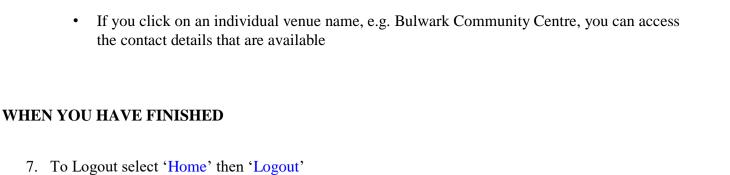
- 1. Access your Group information and update it:
  - At the home screen click on 'Groups' under the Groups heading
  - Click on the specific group in the Group column scroll down until you find it on the table, e.g. 'Photography'
  - A screen headed 'Group Details' appears you can change anything you may need to on this screen
  - Just below the title of the group, e.g. 'Group Record for Walking Striders 1' several options are shown
  - Select, for e.g., 'Members'
  - All the current members of the group will be shown
  - Please check that all your members are there and add any that are missing (see 2. Below)
- 2. Add individual members to the group
  - Access the group information as in 1. Above.
  - Scroll down to the bottom of the list of members (use the black up and down arrows on the RHS to move up and down the list quickly)
  - You can either add members by name or, if you know it, their membership number.
  - To add a member by name, click on the down arrow next to 'Select Member'.
  - Scroll down to the member you want to add and click add that's it done.
- 3. Send an Email to the Group or to Specific Members
  - Once you've opened your group (1. above) click 'select' at the top of the left-hand column. A dropdown appears and click, for e.g. 'select all'. At bottom left you can see 'Do with selected' and next to it 'Send Email' (If you click the down arrow beside 'Send Email' that

are some alternatives). Should you want to send an email click 'Do with selected' and this opens an email with all the addressees you selected.

• Above your own email address, you can see a box headed 'Load standard message', but on many occasions you will probably want to compose a group-specific mail, as when Dave Andrews sends out the Striders 1 emails. You can attach files, such as Striders' meet locations, and the rest is pretty standard email. Probably worth ticking 'Tick to receive copy', then tick send.

## **ADVANCED**

- 4. To add multiple members in one go
  - On the Home Page access 'Members'
  - Select your members by ticking each one (Use the alphabet immediately above the list to find your members quickly)
  - Scroll down to the bottom of the list of members (use the black up and down arrows on the RHS to move up and down the list quickly)
  - Instead of 'Send Email' at the bottom LHS click the black dropdown arrow which will give you several alternatives including 'Add to Group'
  - On clicking that it will ask you which group which you want to select. Click that black dropdown arrow and the available groups will be shown
  - Click the one you wish to select
  - Once you have selected your Group click 'Do with selected' and all your selected members will be added to your group
- 5. Download your Members details in Excel or as a PDF file
  - Access your group members as in 1.
  - If you want to download a complete list of group members click 'Select' at the top of the left-hand column.
  - This will give you a range of options in this case click 'Select All'.
  - Scroll down (or use the black arrows see 3. above) to the bottom of the table.
  - Clicking 'Send Email' gives you some alternatives in this case click 'Download Excel'
  - Then click 'Do with Selected' and select which details you want to download 'Email, Telephone, Mobile, Address, Emergency contact'
  - Your Excel spreadsheet will be downloaded.
- 6. If your normal venue is unavailable, you can browse all U3A Venues to see if you can use an alternative
  - At the home screen click on Venues under the Groups heading



NB If you press 'CTRL' before clicking anything to open a new page, this new page will open in a new tab,

so you don't lose what you were previously viewing – try it, you can't do any harm.