

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

- If you click on an individual venue name, e.g. Bulwark Community Centre, you can access the contact details that are available

WHEN YOU HAVE FINISHED

7. To Logout select '[Home](#)' then '[Logout](#)'

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.