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:

Please login at https://u3asites.org.uk/cardiff/page/85382

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

Your Temporary password is **hX_35^Bx**

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

When in doubt, locate the link 'Home' near the top of the screen and click to return to your Home Page.

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 your 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 Photography' 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' this shows that there are some alternatives). Should you want to send an email, click 'Do with selected' and this opens an email with all the addressees that you selected.
- You can attach files, give meeting locations and other information, and the rest is pretty standard email. Probably worth ticking 'Tick to receive copy', then click on 'Send'.

4. Schedule

- Add either recurrent meetings or single events using the Schedule option.
- In the 'Add Events' section of the Schedule screen, click in the First Date and Time field and a pop-up will allow you to select the date and time.
- For a regular meeting specify the period for reoccurrence e. every 2 weeks.
- You can either then select for a single meeting by setting number of events to 1 or for an extended period by setting a 'Not Beyond' date.
- Enter the End Time, select a venue from the drop-down list and add any Topic and further details
- Remember to save by clicking Add Events

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, for example for a meeting register or event participants, 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 to the bottom of the table.
- Clicking 'Send Email' gives you some alternatives – in this example click 'Download Excel'
- Then click 'Do with Selected' and select which details you want to download – 'Email, Telephone, Mobile, Address'
- Your Excel spreadsheet will be downloaded to your browser Downloads folder. (This is set in the settings for your browser and is not amendable in Beacon).

6. To Logout select 'Home' then 'Logout'

Tip: 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.

HELP: support documents are in the Downloads section of the Cardiff U3A website and additional assistance is available by emailing beacon@cardiffu3a.org.uk