

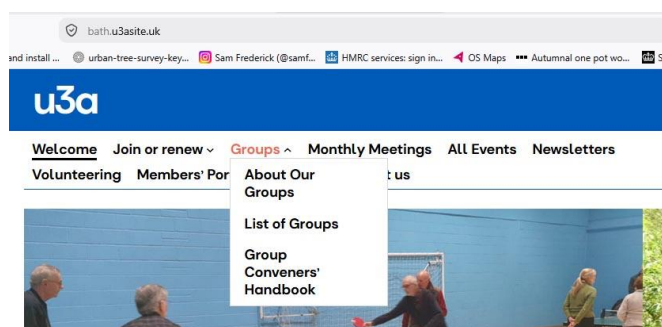
Dear Convenor,

As you may well already be aware, u3a in Bath is moving to a new system of administration with a new website (Siteworks) and a new database/communication system (Beacon). Unlike our present system, Beacon and the website are entirely distinct entities. However, the website has links to log into Beacon for both members and convenors (details below).

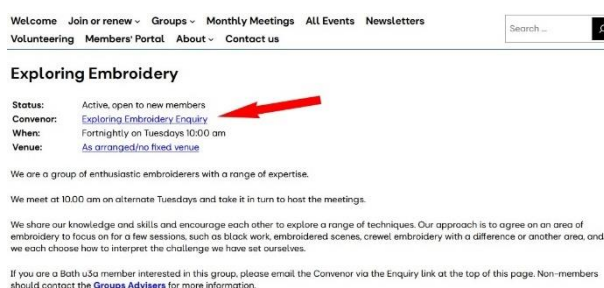
There is information about our Groups on both the website and on Beacon, although that on the website is more detailed.

Website

Information about Groups can be found on the drop-down menu under 'Groups' on the top banner menu. A very helpful handbook for convenors is also in this menu.



All the information about Groups is accessible to the public and so no personal contact details should be included. There is an 'enquiry' button on a Group's webpage that goes to a message form. The message is then automatically forwarded to the convenor's email address, without that address being made public or shown to the sender.



Similarly, the Newsletter is public (it cannot be made available only to members) and so, again, it should not include any personal email addresses or phone numbers.

Anne, our Webmaster is more than happy to update your Group's webpage, if you send her any updates or amendments you want to make. If you wish to update the page yourself, you are welcome to do so and should ask Anne for a username and password.

Beacon

You will be made a user of Beacon, with the ability to update your Group records and to email your members. (NB, Beacon calls Convenors Group Leaders.) Hence you will be given a username and password (which you should change). We will only make one Convenor per Group a user so, for Groups with more than one Convenor, please let me know who will be the user. Once you have your username and password, you can log on to Beacon on <https://u3abeacon.org.uk> or via the 'Group Convenor Beacon Login' button in the (Beacon) Members' Portal you will use to update your own personal details and to renew your membership online. You will need to register separately for the latter.) Select u3a in Bath from the drop-down list, fill in your username & password and click 'enter'. All of what you need to do on Beacon is not difficult and mostly self-evident. Details are given below on pages 2& 3. You may also be



interested in the Zoom training session 'Beacon for the terrified: group leaders' See <https://beacon.u3a.org.uk/training/>

Group List and editing

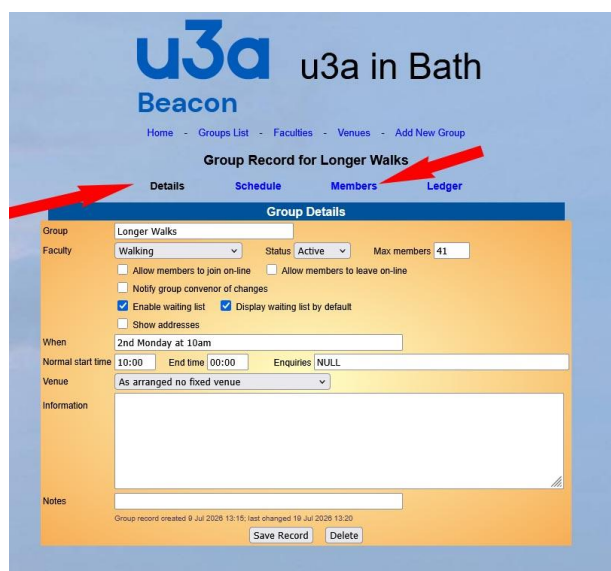


As a Convenor, your home page will look similar to that below, depending on the extent of system access you have been given.

Click on Groups.

This brings up a list of Groups, with those to which you have Group Leader user access in blue. By clicking on a letter in the alphabet above the list, you can jump to that area of the list.

Click on your Group to bring up the Group Record. For the time being, you only need concern yourself with 'Details' and 'Members' – buttons shown by the red arrows.



You can update any of the details but must click

Group Record for Architecture

Details Schedule Members Ledger

☒ Joined members ☐ Show the 1 Waiting member ☐ Show emergency contacts

Select	Member No	Name	Address	Telephone	Mobile	Status	Waiting
☐	1004	Alan Abbey	72 Tonnage Ave, Demotom, DM5 4TS	0123 627 2541	07070 330 963	Current	Leader
☐	1005	Patricia Abrahams	1 High Street, Demotom, DM12 7RA	0123 369 2154		Lapsed	
☐	1007	William Allen	3 High Street, Demotom, DM21 4AB	0123 456 7890		Current	
☐	1008	Will Alsop	1-5 Vyner St, Demotom, DM2 9DG		07551 000 987	Resigned	
☐	1009	Albert Anderson	10 Einstein Close, Demotom, DM26 7ZZ			Deceased	
☐	1013	Susan Apple	3 High Street, Demotom, DM21 4AB	0123 456 7890	07070 345 671	Current	
☐	1021	Zena Ball	33 Dale View Road, Demotom, DM1 2YY		07772 225 654	Current	
Select	Member No	Name	Address	Telephone	Mobile	Status	Waiting

'save record' once you have typed your amendments.

emergency contact details' box above the list, you can include those.

Members shown in red are lapsed or due for renewal.

Members shown in red and struck-through are resigned or deceased and should be removed

You can remove someone from the Group or make them Convenor by clicking on the appropriate wording in the final column.

The Members page shows the contact details of your members. By checking the 'Show

Emailing members of your Group

Go to the list of members.

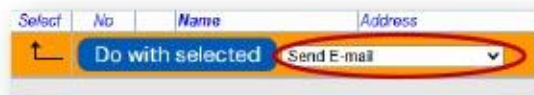


Select the members you want to email by either:

a) Checking the boxes to the left of the membership numbers

Or

b) To email everyone, click 'select' and then 'email only'.



Scroll to the bottom of the list, ensure 'Send email' is selected and click on 'Do with selected'



This brings up the emailing screen.

Beacon itself does not keep any record of the text of emails sent so it is advisable to check the 'tick to receive copy box'.

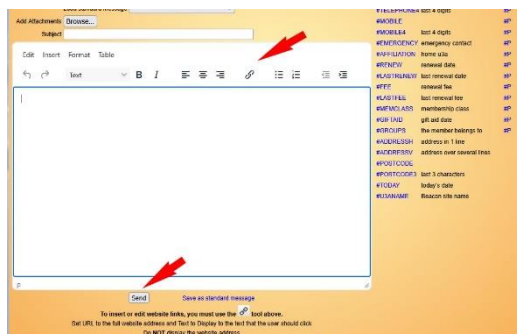
You can add attachments by clicking the 'Choose Files' button and selecting the appropriate file.

Fill in the Subject box.

Then type your message.

You can personalise your message by adding a member's name; start

Dear (or other greeting) space and then click on #FORENAME on the list of 'tokens' to the right of the screen.



You can add a link to a website by clicking the 'link' symbol in the formatting bar.

Finally, click the 'send' button.

Personalise this e-mail using tokens. Click one to insert.

Member		Member's Partner
#TITLE	Mr, Ms etc.	#P
#FORENAME	e.g. William	#P
#SURNAME		#P
#FAM	familiar name e.g. Will	#P
#MEMNO	membership number	#P
#EMAIL		#P
#TELEPHONE		#P
#TELEPHONE4	last 4 digits	#P
#MOBILE		#P
#MOBILE4	last 4 digits	#P
#EMERGENCY	emergency contact	#P

The recipients will be able to reply to you and see your email address (but no one else's).