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The purpose of this bi-monthly newsletter is to provide useful information to our Beacon Users.

Message from Beacon National Support Lead

2022 and the number of u3as using Beacon approaches 500. We have completed two successful pilot trials with Beacon for Networks and thanks to John Alexander, Alan Swindale and their team we are now rolling this out to Networks across the country.

We continue to work on system and database improvements in order to improve the very good data enquiry response times, that we are now achieving.

Once the system is updated we will introduce the email delivery log clean up tool, which will remove all log details that are more than two years old.

Following this we will be introducing a cookie acceptance banner and tick box in line with GDPR Guidelines. Beacon only uses essential cookies, which are required to enable you to use the system and preference cookies, which store your u3a details and your preference settings. You can opt not to use the preference saving cookies. If you are using a publicly accessible computer it is important that you turn this option off. With the option turned on your computer will remember your u3a and login details.

We will continue to work on the member's portal log in and I will have more on this in our next Bulletin.

Frank Bailey

FURTHER INFORMATION

Beacon and Networks and Regions — John Alexander

I would like to give an update on progress in rolling out the Beacon system to Networks and Regions. I am well aware that there is lots of interest and we have been holding off rolling this out until we have done a detailed analysis of the two pilots. This work revealed variations in how the system was set up and used but this also made us analyse how we approach this process.

In parallel with this we have agreement from the Trust on a set of Terms and Conditions (T & Cs) and a Licence Agreement specific to Networks and Regions. These T & Cs makes it clear that there is no charge for this group of users. The links to these documents will be sent to Networks as we roll it out to them.

We are now starting the third site and have refined some of our approaches to address things identified in the pilots. There are only currently two people supporting these Networks and Regions so that we can maximise the information gleaned. While this might be seen to slow things it has the significant advantage that we will be able to use the knowledge to assist each Network / Region.

So to the big question, when will we get to those 14 who have already contacted me about getting Beacon for their Network and Region? The simple answer is as soon as practical and I will be contacting those on the list during January with some planned timescales. We are hoping to bring on two a month so apologies to those who may have to wait a bit.

As I said previously, I have details of those who have contacted me and have them held with the date that they contacted me. We will approach them in strict order based on this date.

Any new Networks / Regions that want to use Beacon please send me an email at: john.alexander@beacon.u3a.org.uk.

Beacon Milestone



We have almost reached the milestone of 500 u3as who are using the Beacon System to manage their membership and groups. A number of articles now appear on the [Beacon website](#) and [u3a website](#) about the benefits of using the Beacon Management System. Beacon mugs and pens are now available to purchase from the [Brand Centre](#).

Contacting Beacon Support

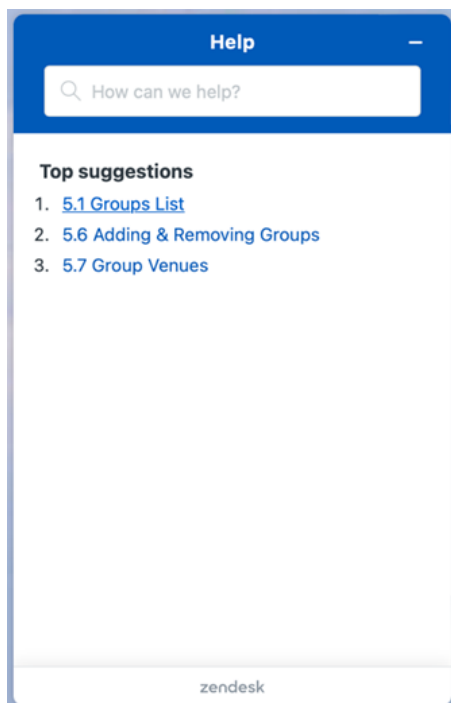
Beacon Help Centre

If you are an existing Beacon user and need technical help or advice then please visit the [Beacon Help Centre](#) where you will find the [Beacon User Guide](#) and lots of useful information about Beacon as well as links to the [Users' Forum](#) and Help Desk. You can also get to the Beacon Help Centre using the Help widget in the bottom left-hand corner of every Beacon page.



We suspect that many people have either not noticed it or just ignored it.

If you press it you will get this screen pop up. The content will vary depending on where you are in Beacon. This example is when on a Group page. It will show you Help articles directly relating to the Beacon area that you are in. This even applies to the screen to log into the system where it covers lost password etc.



If you click on any item in the list, it will take you into that item.

If your interest is any other part of Beacon then just type the item e.g. Membership and the list will change to that area.

This Search facility is powerful so please explore if you need guidance or can't remember exactly what to do.

We are always looking to improve the content so it is worth checking if you need assistance as we might just have a new feature explained or just more explanation on an item that we feel needs more details.

If you cannot find the help you need, then raise a ticket with the Beacon Help Desk. The easiest way to do this is through the Beacon Help Centre – click the [Submit a request](#) link that is present at the top right of every page on the Beacon Help Centre website, or click Help then [Open a Support Ticket](#) and complete the form.

Contact Beacon Support (continued)

Alternatively, you can email: support@beacon.u3a.org.uk , if using this method please ensure you include the following information:

- Your full name
- The name of your u3a
- Subject of your request
- Description of the request or question

Please do not Cc... nor Bcc... other recipients in your request as this may lead to the creation of supernumerary support tickets.

Beacon Website

The [Beacon Website Contact Us](#) form should be used for non-technical queries only.

Beacon Support Teams are all volunteers and will respond to your requests as soon as they are able to.

First Beacon u3a Merger – Graham Tigg

Two Beacon u3as, South Leicestershire and Market Harborough, have merged to form a new u3a Harborough Welland from January 2022. To get them started on Beacon with as much data as possible the membership, group and venues information was extracted from the two u3as, merged and then uploaded to a new Beacon site Harborough Welland.

Clearly one of the drivers for the merger was the number of members belonging to both u3as. For membership data this involved removing the duplicate records.

What are the learning points for this? There needs to be a long preparation and planning lead time, especially if financial and membership years need to be aligned. This can result in continuity challenges with Committee changes.

The only site creation process available is that used for new sites, so there were known limitations such as being unable to populate Groups with members. Being a new charity they fortunately didn't need any Financial data cut over.

First Beacon u3a Merger (continued)

The biggest surprise and an observation for us all, was data quality. Differences in address details resulted in pairs of members in a household not sharing an address, or even a member having a duplicate record as they were not identified as having re-joined. My tip – if you have the skills download all your members to a spreadsheet. Sort them by name and visually check for duplicates. Do the same for postcodes. Longer term we should look to enhance Beacon to perform postcode lookups when addresses are processed.

Beacon Training Videos – John Alexander

To help users the Documentation and Training team have been busy on new training videos. Our plan is to create short 6 – 8 minute videos addressing specific tasks. These will then be accessed via the appropriate section of the User Guide. They are there to enhance the content so we will still continue to develop the main guide content.

You will see at the start of the User Guide contents an article 'Watching Videos in the User Guide'. This is to help those who do not regularly watch videos so it contains help on turning on or off the scrolling text (sub titles) on the screen and how to control the video.

We have planned videos on a number of areas including:

- ⇒ Setting up Roles and Privileges
- ⇒ Setting up System Users and Standard Roles
- ⇒ How to bookmark in your browser to speed up access to a Group info for Group Leaders
- ⇒ Handling Gift Aid
- ⇒ Setting up online membership payments
- ⇒ Membership Renewal process

Plus a number of others are under discussion.



COMMUNICATIONS TEAM

Who we are and what we do

Name	Role
Neil Stevenson	Team Leader
Tony Darbyshire	Webmaster
Malcolm Tulip	Newsletter Editor & Assistant Webmaster

BEACON WEBSITE

Beacon is a management system designed by u3as, for u3as. It provides a simple interface for managing members, groups and finances. Beacon is available to all u3as in the UK that wish to take advantage of it. More information about Beacon can be found through the link to the website.

The members of the editorial team are as follows:

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