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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**

Welcome to Beacon News for March. This month we have had our Beacon Team Conference, where we discussed the way forward for Beacon and the various ways that Beacon and the future u3aSiteWorks could co-exist and at some future date combine. We put together some interesting ideas which gave us food for thought and will be useful in developing a future proposal.

I have had some requests this month about how we process enhancements.

We have a team of seven people representing all areas of Beacon who meet on a fortnightly basis. We bring together ideas for enhancements from individual Beacon users through direct contact or through the Forum. We also have a feed from the Help Desk where any issues with the current software are examined and triaged. Current software issues that affect accuracy, user experience or performance are promoted to the front of the queue.

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## Message from Beacon National Support Lead (continued)

The next stage is to write a specification to pass to our software development team. Once the software change has been developed we take it through user testing on a test server and once approved we pass it back to our software support company to incorporate into the Beacon Production and Demo servers. This usually happens at 10.30 on Tuesday mornings. If a software change affects the way of working for the user, the Documentation and Training team will provide the necessary changes to the User Guide before deployment.

Over the last year we have triaged and supervised over 90 software changes where 50% have been corrections to the way the software works (bugs) and 50% have been upgrades.

**Last month we deployed the following Beacon Tasks (BT):**

BT1783	Make #TOKENS active on System messages
BT1786	Remove Gender defaults when adding members
BT1793	Correct text strings in excel data download. This ensures that Financial Statement downloads to excel are in number format not text
BT1789	The ability to sort Ledger by account in reverse date order.
BT1762	Support for embedded images in emails and many others

**Here is a flavour of what is currently in the pipeline:**

BT1775	The ability to post pending financial transaction for BACS payments
BT1778	Balance brought forward groups so that groups retain the end of year balance and carry it forward into the new year
BT1798	Enable group leaders to view Ledger by Group of any group that they are leader of

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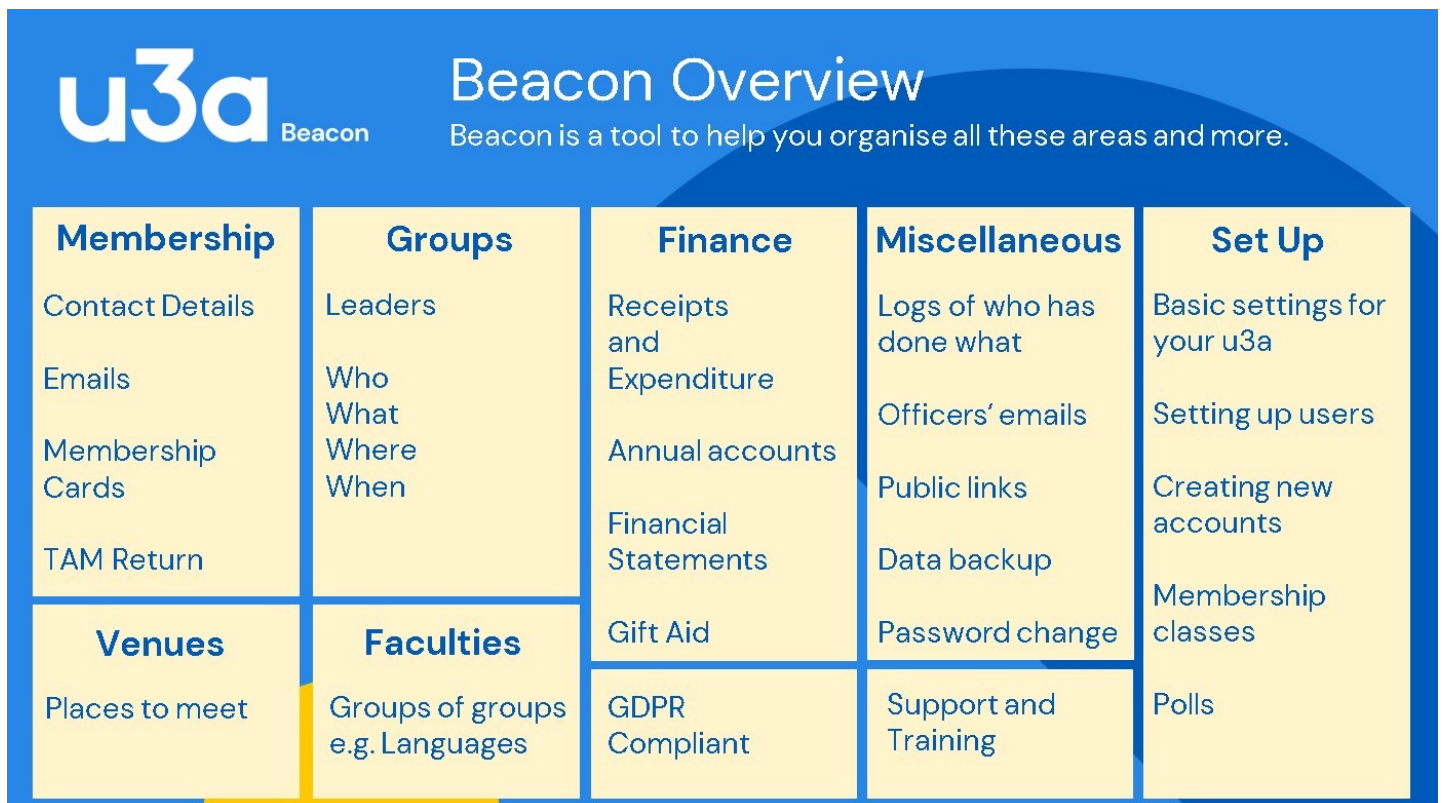
## Message from Beacon National Support Lead (continued)

Later in Beacon News you will see a list of some of the changes that we have made over the last twelve months and I look forward to keeping you updated with Beacon changes going forward.

**Frank Bailey**

### Beacon Overview

Below is a simple overview of Beacon which is based on the u3a Beacon Administration screen after login.



The slide features a blue header with the u3a Beacon logo on the left and the title 'Beacon Overview' on the right. Below the title is a subtitle: 'Beacon is a tool to help you organise all these areas and more.' The main content is a grid of yellow boxes with blue borders, organized into two rows. The first row contains five boxes: Membership, Groups, Finance, Miscellaneous, and Set Up. The second row contains three boxes: Venues, Faculties, and a box that is partially obscured by a yellow bar at the bottom. Each box lists specific sub-items related to that category.

Membership	Groups	Finance	Miscellaneous	Set Up
Contact Details	Leaders	Receipts and Expenditure	Logs of who has done what	Basic settings for your u3a
Emails	Who	Annual accounts	Officers' emails	Setting up users
Membership Cards	What	Financial Statements	Public links	Creating new accounts
TAM Return	Where	Gift Aid	Data backup	Membership classes
	When	GDPR Compliant	Password change	Polls
Venues	Faculties		Support and Training	
Places to meet	Groups of groups e.g. Languages			

This slide can also be viewed on the Beacon website [here](#).

## FURTHER INFORMATION

### Beacon Enhancements Specifications

In the November 2023 edition of Beacon News, Marion Sharp wrote about the Enhancements team. Essentially the team brings together five main ingredients needed to facilitate a change – Help Desk/Forum, Documentation (User Guide), Training, Testing and Specifications.

The contractor that looks after the Beacon code and infrastructure (Siftware) implement all changes to Beacon. This can range from a simple bug fix, for example the incorrect sorting of surnames, to a complex feature such as the portal logon with email and password. The challenge of writing specifications is to describe the changes to Siftware. While Siftware have expertise in matters relating to the Beacon code and database, it's fair to say they have very little knowledge about the business modus operandi of u3as.

Think about making a floor in your house open plan. You wouldn't have a chat with a builder about what you want and let them get on with it, you would utilise an architect to make clear plans. This will increase the chances of the builder creating what you want. We all know that rectifying building work after the event, or even during it, absorbs time and hence £££s.

This means that a change or enhancement needs to be spelt out as clearly as possible. We create mock-up screens of what we want and, trickiest of all, say what needs to happen in all the situations we can think of (the jargon here is 'use cases').

A final point is that not all changes are particularly visible for users. Replacing the electrical wiring in your house may be essential but it won't change the look of things as much as making it open plan.

**Graham Tigg**

Enhancement Specifications

## Beacon Finance Clarification

It is apparent from training and Question and Answer sessions that there are some aspects of Beacon Finance that people are not clear about, so I hope that this article will answer some of them.

### **There can be concerns about the security of Beacon.**

- All Beacon sites have their own users with a user name and password needed to access the system and they should also protect their device with a sign on.
- Even then their rights to see, change, add, are all subject to the privileges given by agreement with the u3a's committee and set within the system. Beacon has daily system backups.
- If you use a spreadsheet what happens if the computer is hacked / breaks down! Can a new Treasurer understand your spreadsheet?

### **Who can do and see things in Beacon?**

- As described above each user can have very specific rights:
- E.g. A committee member may have rights to only view the accounts.
- A Treasurer can see all transactions, post new ones, amend them and delete them.
- A Membership Secretary may be able to see posting in the Membership account but not change or delete them and not have any access to the current account in the system.

### **Is there a way to check who did what in Beacon?**

- There is a comprehensive Audit trail for actions within Beacon. Who entered something and what they added, changed or deleted etc. It details who it was, the date and the additions / changes.

## **Beacon Finance Clarification (continued)**

### **Is the Finance linked to Membership?**

- Membership renewals and new members payments go by default to the Membership Account.
- If an amount greater than the membership fee is entered by the Membership Secretary or a Member (if using an on-line portal), then the system will split the membership fee to Membership and the excess to Donations. The Treasurer / Membership Secretary can then assign to an appropriate analysis category, subject to the rights that they have.

### **What about handling Gift Aid?**

- There is a comprehensive set of programs that track from the members opting to allow it to be claimed, through to a standard export that can just be copied into the HMRC claim system. The tracking is retained for as long as required.

### **Is the Finance side of Beacon easy to use?**

- It is designed to be a simple Receipts and Payments system, so you do not need to be an Accountant to use. However, because any system can be difficult when starting to use it, we provide a demo site to practice on, a very comprehensive User Guide and Training, Mentoring and a Help Desk. This can help get a new treasurer into the role as we can help them get to grips with the system.
- We should stress that Beacon, as a system including the finance section, are under constant review and there is a very active Enhancement program to add new functions, make things easier and consider users suggestions.

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## Beacon Finance Clarification (continued)

Can you set it so an external examiner can see the system?

- It is perfectly feasible to set a User to only view the financial information. This removes the need to send lots of Excel paper files.

**John Alexander**

Training and Documentation Lead

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## Beacon Leaflet

If you know of any u3a who doesn't use Beacon, they may find the [Beacon Leaflet](#) will help explain the benefits of using this membership management system for their u3a.

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## Beacon User Statistics

As of the 12th March 2024, the number of live sites and their members, are shown below.

u3as / Networks / Regions	Number
u3as using Beacon	584
Members in these u3as	269,328
Networks / Regions using Beacon	14
Members in these Networks / Regions	4,114

## **A selection of changes that we have made over the last twelve months**

- Tokens Clickable, arrangement
- Spell check etc in emails
- Stop duplicate System User Name
- Add Venue to Groups download
- Increase Groups Contact field length from 32 – 64 characters
- Strike through, Deceased and Lapsed in Groups lists
- Inhibit emails to deceased members

### **Operational Changes**

- ⇒ Improve Audit Log data
- ⇒ Ability to log in from iPhone
- ⇒ Notify both admin and sender of email failure
- ⇒ Add ability to email system users

### **Members and their access**

- ◇ Improvements to Membership Cards, emailing etc
- ◇ Address photo on membership card
- ◇ Address title in Gift Aid download
- ◇ Sort problem with mixed case in email address
- ◇ Validate email address in on-line applications
- ◇ Address phone number in Members lists
- ◇ Address replacement membership card configurable
- ◇ Add selection of POLL for members joining

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## A selection of changes that we have made over the last twelve months

(continued)

### Financial

- \* Ledger Sort
- \* Unclear Reconcile transactions
- \* Bulk select in Reconciling
- \* Correct negative values in Statement
- \* PayPal return to sender change



Keeping u3a  
Connected

# COMMUNICATIONS TEAM

## Who we are and what we do

Name	Role
Malcolm Tulip	Team Leader
A N Other	Newsletter & Website Administrator
A N Other	Website Support

## Beacon Communications Team



Malcolm Tulip  
Team Leader



A N Other  
Newsletter &  
Website  
Administrator



A N Other  
Website  
Support

## BEACON WEBSITE

Beacon is an on line 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:

**Editor:** Malcolm Tulip

Email: [malcolm.tulip@beacon.u3a.org.uk](mailto:malcolm.tulip@beacon.u3a.org.uk)

**Proof Reader:** Graham Tigg