



**BEACON NEWS**

**Edition: 31**

**March 2023**

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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**

Why are people uncomfortable or afraid to ask for help? So many times, I have spoken to Beacon users who believe that Beacon is not providing the information that they need to run their u3a or their u3a finance. On investigation the Beacon support team have found that the issues are around system settings or a lack of knowledge of what Beacon can do. As we are in the run up to our main renewal period an example of this was a u3a asking why when they clicked to bring up the Membership Renewal page there were no members in the list for renewal. The answer was that the membership year start date was four weeks away and the administrator had set the advanced renewals to three weeks.

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## **Message from Beacon National Support Lead (continued)**

Henceforth no members were due for renewal until the end of following week. This was resolved by extending the advanced renewals period. This situation was resolved quickly and could have been resolved even quicker if the membership secretary had contacted their system admin and Treasurer to agree what the rules around renewals should be. The moral of the story is please ask your Beacon administrator or whoever sets the rules for your u3a membership, finance or groups and have a look at the interactive HELP support. If all this fails to resolve the issue, we are here to guide and investigate issues on your behalf.

To improve Beacon knowledge, we are continuing to run presentations and courses on the various aspects of Beacon. We are aware that the courses get booked up quickly and we are continuously adding new dates to accommodate u3a members but as the Beacon team are all volunteers, we are doing our best to make sure that everyone gets a chance to attend.

**Frank Bailey**



## FURTHER INFORMATION

### Beacon Training - Update

We have added a new course Chairs and Vice Chairs. This is to make these role holders aware of all the facilities in Beacon. Our aim is to show them how their u3a can make more use of Beacon and how these things will help reduce the workload of the committee. It is not to train them on setting up these specific facilities. We currently have 6 courses scheduled and well over 200 people attending.

One unwelcome development is the tone of emails when people fail to get on a course. We are all volunteers. While accepting the disappointment might I mention that we have started warning Site Admins when we will be sending the course details out. Our hope is that they warn the relevant people in their u3a so they can apply promptly. Obviously as the first rush dies down it should become easier to get on courses. We are not providing any second level courses so if you have attended a particular course, you will not be able to attend another of the same course.

I know you may think, "why not send the booking details to me directly". Simply with well over 500 sites just keeping the database of Site Administrators and their emails up to date can be a challenge. We rely on them to tell us of changes. To try to extend this to other u3a post holders would be very difficult. These roles can change at a wide range of time throughout the year.

The future plans for training already under way are to expand the pool of knowledgeable Beacon Team members to deliver the courses. This will allow us to organise a monthly set of the 5 courses currently organised.

We are slowly increasing numbers on the courses but as we want to train people, and given the wide variety of ways the u3as operate, we need to ensure delegates can gain a good range of skills from the courses.

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## **Beacon Training – Update (continued)**

Please bear with us, we will add more course as soon as practicable.

**John Alexander**

Documentation and Training Lead

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## **Software Testing**

The Beacon Software testing team is responsible for testing all releases prepared by our developers, Siftware, before they are deployed to the live system. This includes new developments which have been specified by the Enhancement Team and fixes for problems which have been discovered by the Beacon community and prioritised for resolution.

Testing is carried out by a small team of Beacon volunteers who have a wide range of experience in using Beacon, so are able to review the impact that a proposed change may have across the full Beacon system. Recent tests have covered the Gift Aid enhancements to improve the recording of changes to members' Gift Aid status and improving the emailing of membership cards to joint members who renew online.

Testing is now underway on developments to improve the security of the members' portal by introducing a username and password access and to allow the emailing of multiple membership cards by the membership secretary.

**Gary Nye**

User Acceptance Team

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## u3a Support Forum

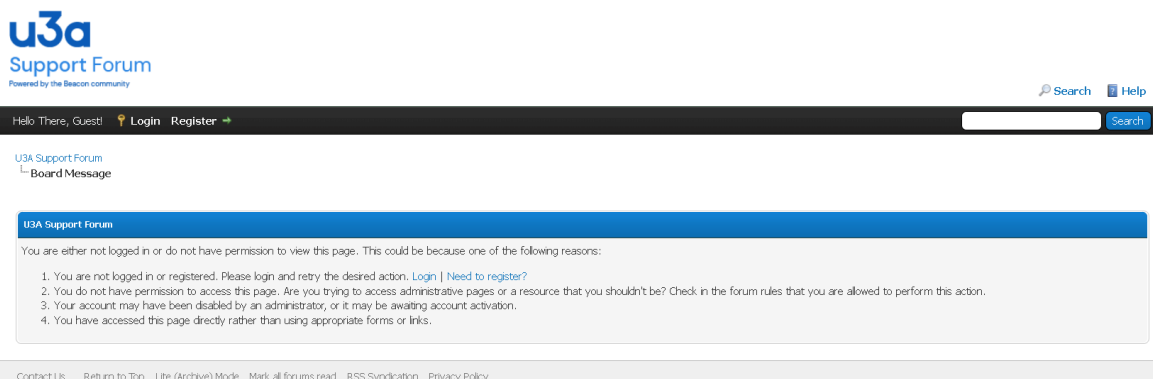
The u3a Support Forum had been named the Beacon Forum until, with Covid, it was decided to widen its scope to all things to do with the u3a movement. Nevertheless, the majority of its content is to do with Beacon.

### How does the Forum work?

All the contributions on the Forum are from u3a members and are moderated to maintain a civilised discussion of issues raised. There may be a query about how to use, or best use, a Beacon feature, or a suggestion for a useful enhancement to Beacon to which other Forum users can contribute their comments.

At present there are around 30 contributions (or 'posts') each week from some of the 3,270 registered members of the u3a Support Forum and there have been a total of just under 19,000 posts.

Membership of the Forum is completely independent of membership in a local u3a. Local u3a usernames and passwords will not work! To register go to : <https://forum.u3abeacon.org.uk> , click on the 'Register' link and provide a Username of your choice, a Password and an Email address. You can also set up some account preferences but you may ignore these. After submitting the registration, you will be able to view the Forum but will not be able to post your own contributions until your account has been activated by an Administrator; this will normally occur within 24 hours and you will receive a message to your email address.



The screenshot shows the u3a Support Forum interface. At the top left is the logo "u3a Support Forum" with the tagline "Powered by the Beacon community". On the right, there are links for "Search" and "Help". Below the header, a navigation bar shows "Hello There, Guest!" with "Login" and "Register" links. The main content area displays a message: "U3a Support Forum Board Message". A blue box contains the text: "U3a Support Forum You are either not logged in or do not have permission to view this page. This could be because one of the following reasons: 1. You are not logged in or registered. Please login and retry the desired action. Login | Need to register? 2. You do not have permission to access this page. Are you trying to access administrative pages or a resource that you shouldn't be? Check in the forum rules that you are allowed to perform this action. 3. Your account may have been disabled by an administrator, or it may be awaiting account activation. 4. You have accessed this page directly rather than using appropriate forms or links." At the bottom, there is a footer with links: "Contact Us", "Return to Top", "Lite (Archive) Mode", "Mark all forums read", "RSS Syndication", and "Privacy Policy".

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## U3a Support Forum (continued)

The u3a Support Forum is organised as a number of sub-forums grouped together as:

- General
- Our u3a community
- Learning
- Beacon

Any member can raise a new topic in a relevant sub-forum by clicking on the 'Post Thread' button or reply/comment by clicking on 'Reply' within the topic's thread.

### Recent Topics

In the week ending the 25<sup>th</sup> of February, which is typical, the topics discussed were:

<b>Subject</b>	<b>Total Posts</b>	<b>Posts that week</b>
Payment methods	11	4
Online Membership renewals	10	8
Downloading Membership Cards as image	9	2
Maths Challenges	456	1
limit on number of emails that can be sent	6	4
Add trial members to BEACON	16	7
Duplicates on Membership Renewals Screen	5	5
Renewing honorary members	7	2
Renewal list after grace period	3	3

(Maths Challenges is a long running topic in the Learning Group of topics).

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## U3a Support Forum (continued)

### Error Warning Messages

Regular users of the Forum will have been aware of error warning messages which have started to appear again above the message pane. These last appeared when it was necessary to change the internet server hosting the Forum. An update of the software cleared the problem. It has been necessary to once again change the server and the warning messages reappeared! It is hoped that a similar remedy will be effective.

### Help

The Beacon Forum was launched before there was an effective Beacon User Guide, nor was there a help desk. I would now encourage any Beacon User seeking help to first click on the Help button on any Beacon screen. This will take you to links to relevant pages in the User Guide as well as a facility to report problems to the Help Desk. The Forum, however, is the best channel for discussion.

### Moderator wanted

We are looking for a deputy/backup Moderator for the Forum. The Forum will normally run on auto-pilot but it is very desirable to run a human eye over the posts daily. If anyone is interested in getting involved – and taking over in due course – please email me at [forum@beacon.u3a.org.uk](mailto:forum@beacon.u3a.org.uk) .

**Alan Swindale**

Forum Moderator and Administrator



## Enhancements Team

It's coming up to 2 years since the Third Age Trust Trading Limited (TATTL) asked the Beacon Team of volunteers to take over the day-to-day management of Beacon as a system. Our role focuses on the work Siftware are contracted to do with us – responsibility for the platform and source code.

Up to 10 of us meet once a fortnight to review progress and triage new issues. Between us we represent issue tracking, specifications, testing, the help desk, forum monitoring, documentation and training.

The Help Desk (our support tickets), the Forum, TATTL and Siftware themselves are the main source of input. We try to assess the importance of issues and how we might address them. We consider factors such as impact, implications, workarounds and likely complexity and hence cost (Siftware resource). In some cases we need Siftware to try and track down the issue and that diverts their development effort. Other cases turn out to be u3a misunderstandings or the need to tweak our User Guide.

As well as moderating the Forum, our lead Alan does an extraordinary job in tracking everything from significant to minor. We need to know if something has been seen before and our extensive records go back more than 6 years.

Alan's article covers the more visible changes to Beacon we see. Going forward the reality is we can't give priority to a feature only one or two u3as request. Our biggest challenge is estimating how long enhancements will take to deliver and hence setting all our expectations. A challenge we share with much of the software industry and beyond.

If you would like to help and become and involved we would really appreciate more testers.

**Graham Tigg**

Enhancement Specifications



## Improvements to Beacon

Beacon, the membership system designed for u3as, is improving all the time. Little changes add up over time improving performance, removing irritating inconveniences and making the system easier to use.

The system is now reliable after changes were made to remove performance bottlenecks and the underlying software was updated to the latest versions.

### Statistics

65 enhancement tasks have been completed since the Enhancement Team was set up in April 2021. 17 more have been deployed on the live system and are just waiting to be fully proved in service as opposed to being tested on an offline system before being closed out. 2 more changes have been coded and are undergoing offline test before release. 10 more are being worked on by the software developers. 7 are ready for the developers' attention. Finally, 7 more changes are being investigated and specified by the Beacon team with many more waiting for specification.

### What has been changed?

The most noticeable change has been the addition of the Help button on every Beacon page. The effect of clicking on this is context sensitive, that is the results it presents from the Beacon User Guide depend upon the page in Beacon open at the time. The Beacon User Guide is continuously being updated, both in response to software changes and to feedback from u3A members. Close to the Help Button is the Cookie Control button which was added to ensure that Beacon met legal requirements regarding user options remembered in the software. It is recommended that you allow optional cookies to make your life easier when using Beacon!

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## Improvements to Beacon (continued)

The management of Gift aid has been improved, including the provision of a Gift Aid audit log. In the finance package the default account is no longer the membership account but rather the last account used.

Less noticeable are quite a few changes concerned with inconsistencies within Beacon in the presentation of information on different screens or in different reports. For example where a request to sort by membership number actually sorted by 'mkey'; this usually gave the expected result but not always! This is now corrected.

The facility of a practice version of Beacon provided for each u3a has been updated.

Also:

The link between post codes and StreetMap was repaired after changes in StreetMap.

Printing of blank membership cards during grace period has been corrected. Update B/F button (in calendar year after start of financial year) now works as expected.

Beacon no longer attempts to send email to a Group Leader/Convenor without email.

Both members' numbers are shown, when relevant, in Ledger by account.

### Beacon User password management

The management of passwords within Beacon was not consistent. A password policy has been established which has been applied to Beacon User passwords and which will be also be applied to member portal logins when they are changed from 'five pieces of information' to a more conventional user name and password system in the near future as soon as it is tested successfully.

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## **Improvements to Beacon (continued)**

### **Beacon for Networks**

Beacon is being rolled out to those u3a networks who have requested it, primarily for email management.

### **Coming soon**

The production of membership cards will be enhanced, as will the management of group waiting lists.

Emails will be enhanced by spell-checking, the ability to change fonts and to include graphics, hash-tags will no longer need to be typed in but will be able to be included by clicking on the list.

A little further back in the list are packages to improve the management and reporting of Group Finances and to enhance the facilities for preparing letters within Beacon.

### **Longer term**

#### **SiteWorks the Site Builder Replacement**

The Beacon Team takes no credit for the work that is being done on Siteworks, the replacement for Site Builder.

It is a WordPress development with a u3a specific branding theme and plugins.

The migration of Site Builder u3as is expected to start this summer.

Initially it will replicate Site Builder functionality, but links to integrate with Beacon are expected to be a significant part of future developments.

### **Alan Swindale**

Forum Moderator and Administrator



# COMMUNICATIONS TEAM

## Who we are and what we do

Name	Role
Neil Stevenson	Team Leader
Tony Darbyshire	Webmaster
Malcolm Tulip	Newsletter & Website Support

## Beacon Communications Team



Neil Stevenson  
Team Leader



Malcolm Tulip  
Newsletter &  
Website Support



Tony Darbyshire  
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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