



BEACON NEWS

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July 2024

In this edition:

- Purpose of newsletter
- Message from National Support Lead
- Further Information
 - ⇒ Beacon Software Testing
 - ⇒ Beacon Notices
 - ⇒ Beacon User Statistics
 - ⇒ Beacon Training
- Communications Team

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

Message from Beacon National Support Lead

Here we are at 600 u3as on Beacon.

Beacon is now used by more than 600 u3as to manage their Membership, Finance and Communications. It is not a website, but we are working hard with our SiteWorks colleagues to provide a joined-up solution of a website with enhanced u3a communication and management.

Using Beacon will make your u3a management so easy.

Over the last two months we have introduced the following features:-

1. The ability to make a payment to the u3a Pending. You would use this when a payment, electronic or otherwise, is promised but not yet received. Included in this release is the ability to select the default Membership payment type and the default account that a particular payment type should be paid into.

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Message from Beacon National Support Lead (continued)

The next release:-

2. Gave the Site Administrator the ability to allow Group Leaders to view their group finances in Ledger by group.

This was followed by:-

3. The ability to bring forward year end financial balances attached to groups.

This enables groups to maintain their finances recorded in the main u3a account.

The use of all these changes can be viewed in the user guide.

We are currently working on the ability to record financial refunds, improving financial reports and exploring the possibility of using online payments methods other than PayPal. We will keep you updated with our progress.

Frank Bailey



FURTHER INFORMATION

Beacon Software Testing

The Beacon Software testing team is responsible for user acceptance 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 Supporters 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 included:-

- Enhancements to the Finance section, including pending transactions, configuration of posting transactions to appropriate accounts, group balance reporting,
- Enhancements to downloads for Group details,
- Removal of gender information on member records,
- Enhancements to email system,
- Allow selected Polls to be joined by members using the member's portal.

The Testing team work closely with the Documentation team to ensure that changes to the Beacon user guide are released in time to inform users of the enhancements.

Gary Nye

Software Testing Lead

Beacon Notices

Two important notices so please make appropriate people in your u3a aware.

Please note that this change happened near the end of June and you will see that we still leave in place the Title. (Mr, Mrs, Miss etc.) These titles are important when claiming Gift Aid.

I have had a few questions about the Gender field. This related to Male, Female and unknown which were types of gender now removed from Beacon.

1. We have removed Gender Status.

As a result of evolving social conventions and legislation, is it no longer considered appropriate to store the gender of members in the way Beacon has done (Male, Female, Unknown). The Trust has decided this information should be removed from Beacon.

This will impact on various aspects of the system; Joining, Renewals, etc.

You will also note that the Statistics and downloads have also changed to accommodate this change.

2. An effect of the Introduction of Pending Transactions

Introduced at the end of June, this change enables Treasurers to make some transactions Pending. They can also set the default accounts for posting Membership money received.

One key benefit what was a setting in the Site Record that was only available to the Beacon Team. Now it is under the control of the Treasurer/Site Administrator.

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Beacon Notices (continued)

Can we ask that you check these settings in Finance Accounts and then under Membership Payment Method Defaults. It is important to make sure that they accord to your approach.

John Alexander

Training and Documentation Lead

Beacon User Statistics

As of the 3rd July 2024, the number of live sites and their members, are shown below.

u3as / Networks / Regions	Number
u3as using Beacon	600
Members in these u3as	273,538
Networks / Regions using Beacon	15
Members in these Networks / Regions	4,359

John Alexander

Training and Documentation Lead

Beacon Training

So far this year we have held 33 courses with 857 attendees.

More courses are being scheduled for Sept / Oct / Nov and dates for these will be released later.

We will continue to run courses for :

- Site Administrators
- Chairs
- Group Coordinators
- Membership Secretaries
- Treasurers
- Business Secretaries

We also ran a number of Q&A sessions covering new aspects of the finance.

John Alexander

Training and Documentation Lead



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



Graham Tigg
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:

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