



BEACON NEWS

Edition: 40

September 2024

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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

We take the security of our users' data very seriously. As part of our security development, we have updated the Beacon Kill switch procedure.

We tested the whole scenario last Thursday and I am pleased to say that the procedure worked as designed. This procedure enables both of the Beacon production servers to be shut down with a single action. I do apologise to anyone who had not seen the warning notices sent out over the last two weeks and were using the system when we shut it down.

This action would be implemented after a series of tests and management consultations. It would be taken if a threat to the integrity of the system was detected or flagged up by users, after an examination by the Beacon team.

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Message from Beacon National Support Lead (continued)

We are introducing Google Maps to replace Street Maps. This will provide more detail of a venue location. It is important that the address details are entered correctly as Google uses postcode and address to support location identification.

We have been asked by many of our users if we could update Beacon to give Treasurers the ability to make refunds without affecting expenditure. This is now ready for deployment and is planned to be introduced in mid-September after a short training and awareness programme. Please continue to enjoy using Beacon. If there is something that you don't understand or something that does not work for you, please contact us at: - info@beacon.u3a.org.uk.

Are you interested in joining the Beacon Support Team?

We now have over 600 u3as using Beacon and we are looking for someone to join our Documentation and Training team and the u3a Direct Support team. We have over 50 members in our Beacon Support and Development team and we would welcome anyone to the team who is interested in helping u3as get the best out of Beacon.

If you are interested, please contact us at: - info@beacon.u3a.org.uk.

Frank Bailey



FURTHER INFORMATION

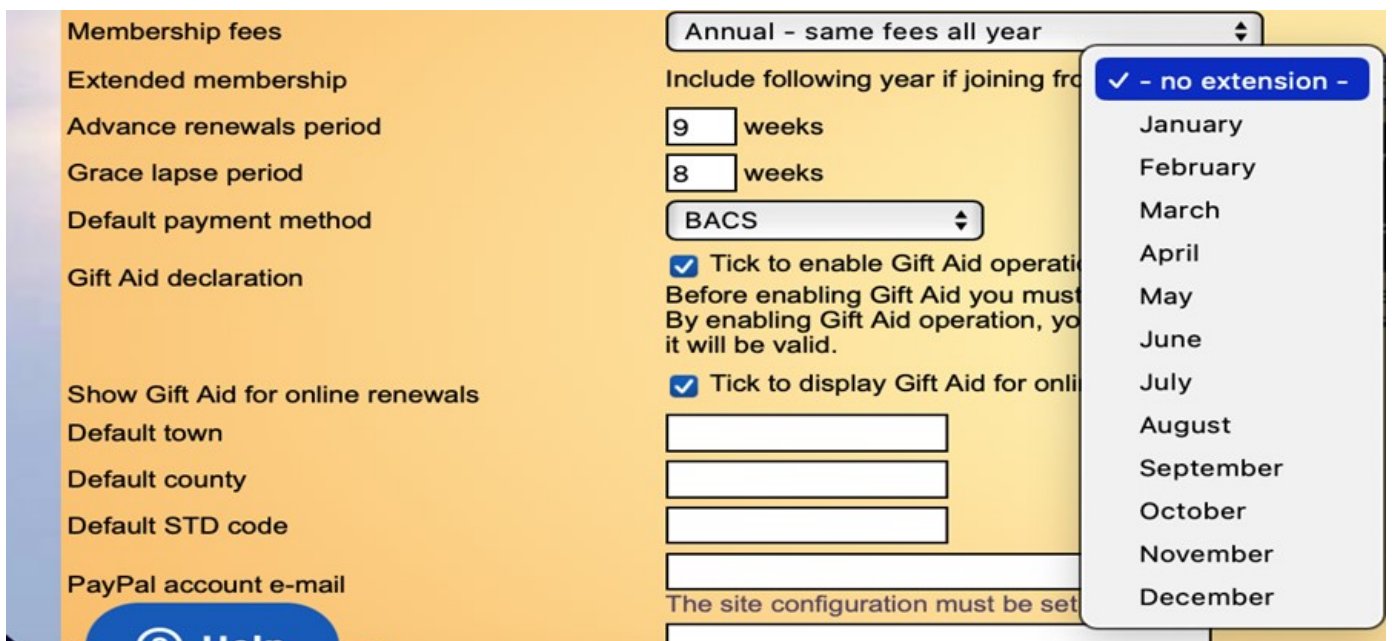
Beacon Settings

We are noticing a few things where some u3a sites might benefit from a change to their settings in Beacon. These are only suggestions but they might be worth considering.

1. People joining a u3a a month or so before the start of the new Membership Year.

There is a setting that lets a new member join in a period before the start of the membership year. They pay the usual annual fee but receive a month or so extra membership. The default is **no extension** but if it was set to March and your Membership Year started on 1st April, then a new member joining in March would receive 13 months membership for the normal 12-month fee, but only for their first year. On renewal they then pay the normal amount and get 12 months.

In System Settings, as shown below, under Extended Membership, you select the month for the start of the extra period prior to your membership year.



The screenshot shows the 'System Settings' interface for Beacon. The left sidebar lists various settings categories. The main content area is titled 'Extended membership' and includes the following fields and options:

- Membership fees:** Annual - same fees all year (dropdown)
- Include following year if joining from:** A dropdown menu is open, showing a list of months from January to December. The selected option is **✓ - no extension -**.
- Advance renewals period:** 9 weeks (input field)
- Grace lapse period:** 8 weeks (input field)
- Default payment method:** BACS (dropdown)
- Gift Aid declaration:** Tick to enable Gift Aid operation. Before enabling Gift Aid you must... By enabling Gift Aid operation, you... it will be valid.
- Show Gift Aid for online renewals:** Tick to display Gift Aid for online renewals.
- Default town:** (input field)
- Default county:** (input field)
- Default STD code:** (input field)
- PayPal account e-mail:** (input field)

At the bottom of the settings area, there is a note: "The site configuration must be set..."

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Beacon Settings (continued)

This avoids the Membership Secretary having to remember at the renewal time to change from a Membership Class of Part year to Full Year. It also avoids the complication if they were to forget to make this change of then the system recording in the Ledger an incorrect fee.

2. Another area often not understood is Annual Fees as shown on the previous page being set to be the same all year. Another common approach is a reduced fee where people join halfway through the Membership Year. This can be dealt with by having two Classes of Membership Individual and a second one of Individual (Part Year).

This again can create a problem at renewal time where a change from Part Year to Full Year is overlooked.

If you selected from the drop-down list: Annual Fees vary by Month of Joining then in the class of membership you can set different fees.



A screenshot of a software interface showing a dropdown menu for 'Membership fees'. The selected option is 'Annual - fees vary by month of joining'.

This means at renewal time they will automatically be expected to pay the full fee but no change is necessary to the member's record.



A screenshot of a form titled 'Membership Fees per person for this class (£)'. The form has two columns: 'Renewal' and 'New members'. The 'Renewal' column has a single input field. The 'New members' column has input fields for each month from April to March. The values are: Apr (10.00), May (10.00), Jun (10.00), Jul (10.00), Aug (10.00), Sep (10.00), Oct (10.00), Nov (8.00), Dec (8.00), Jan (8.00), Feb (8.00), Mar (8.00). There is a checkbox for 'Auto-propagate: changes will be copied to months to right' which is checked. Below the form, there is a note: 'All fields must be completed' and 'Note that these are always fees per person, even for Joint memberships'. A 'Save Fees' button is at the bottom.

Renewal	New members
	Apr
	May
	Jun
	Jul
	Aug
	Sep
	Oct
	Nov
	Dec
	Jan
	Feb
	Mar

Auto-propagate: changes will be copied to months to right

All fields must be completed

Note that these are always fees per person, even for Joint memberships

Save Fees

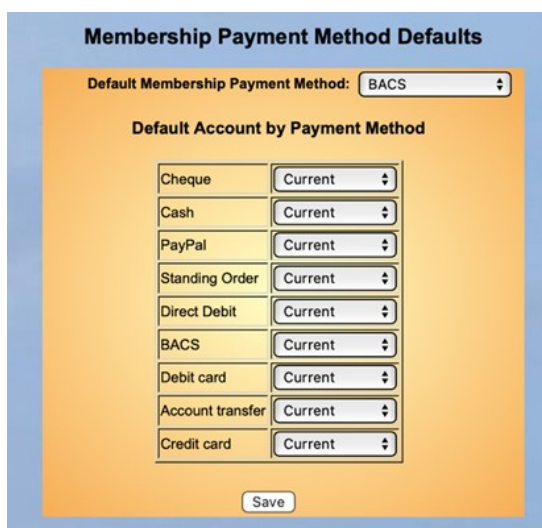
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Beacon Settings (continued)

3. Membership Payment Defaults

Previously the destination of a Membership payment was set as a default in settings not available to the individual u3a. The Beacon Team felt this could be restrictive so introduced this new option. It is accessed by a new option from the Finance Accounts screen.

If you select this you then see the following options.



Default Account by Payment Method	
Cheque	Current
Cash	Current
PayPal	Current
Standing Order	Current
Direct Debit	Current
BACS	Current
Debit card	Current
Account transfer	Current
Credit card	Current

Because BACS payments are made directly to the Bank account this default can be set to **Current**. There will be delay in banking cheques and cash. Posting those fees to a **Membership** account and once banked doing a 'Transfer money' to **Current** for the actual amount banked will keep Beacon's **Current** account in line with the Bank statement and simplify reconciling.

Here you as Treasurer can decide in discussion with your Membership Secretary the default destination of a type of payment.

To conclude some these are new facilities introduced over the past few months but in such a way that if you're happy with how things work now, you do not need to make any change. If you want to use these features, then they are currently available.

John Alexander

Training and Documentation Lead

Beacon Support and Migration

....Going from hearing about Beacon to your own live Beacon website.

With now well over 600 u3as and 15 Networks using Beacon and over 40 investigating its use, other u3as are hearing about Beacon from users as well as our own publicity.

Some u3as are being supported by a neighbouring u3a and are given demonstrations from them before coming to us. This shows an enthusiasm for spreading of the word!

Our team of supporters has slightly changed over the year as some retire and new ones join. The same with the migration team: we are really pleased to have some volunteers who joined us in taking the u3a that last step from checking their data and moving it into a new live site.

The support we provide comes in a number of ways. The first is the opportunity to try out a practice version of Beacon, 'Demo24'. This lets the local u3a try out all the functionality of Beacon except for emails – they are all fictitious after all.

With this comes a personal supporter from our team. They have all been using Beacon themselves for many years and are there to answer any questions that arise.

We can also provide a Zoom presentation. Our supporters are located all over the country and Zoom allows this contact over any distance.

In 'Demo24' and in Beacon there is a fantastic User Guide which covers all aspects of Beacon and as its online, so this provides local users with instant access to find answers to any problems encountered.

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Beacon Support and Migration (continued)

The local data is often kept in a variety of ways. If there is a problem moving this into our Excel template then the migrators are there to help with that as well.

Once live your 'Demo24' is always there, the supporter will be there for another 3 months and the User Guide is constantly available.

If all else fails we have a Help Desk, also accessible through Beacon, where any questions we can't answer go!

User Guide and Help Centre can be found here: <https://u3abeacon.zendesk.com>.

If you want to know more about Beacon, ask in your Network or Region or mail us at info@beacon.u3a.org.uk.

John Hopkins

Journey and Migration Lead

Beacon User Statistics

As of the 26th August 2024, the number of live sites and their members, are shown below.

u3as / Networks / Regions	Number
u3as using Beacon	607
Members in these u3as	278,858
Networks / Regions using Beacon	15
Members in these Networks / Regions	4,490
u3as evaluating Beacon	14

John Alexander

Training and Documentation Lead

Beacon Accounting–Balance Difference

Occasionally a ticket is submitted for a **Balance Difference** problem in **Reconcile account** and at times, its operation may be confusing. **Balance Difference** is a comparison between a ledger's current balance and the combined value of all previously cleared transactions. When working correctly, **Balance Difference** will be **0** when all transactions have been cleared or are selected to be cleared. A positive **Balance Difference** indicates the total value of all transactions cleared and selected to be cleared, is less than the current ledger's balance. A negative **Balance Difference** indicates the total value of all cleared transactions plus those selected to be cleared, is more than the ledger's current balance.

Problems where **Balance Difference** is wrong usually occur at u3as who delayed using Beacon's finance system and then before using it, did not reset it fully. Problems may also occur if, after the automatic year-end rollover, transactions are added, adjusted or deleted, in what has become the previous year and affect its closing balance, but are not brought forward into the new current year. A **Balance Difference** problem is often long-standing and has carried over from one year into the next and will continue do so until corrected.

To check for a **Balance Difference** problem, click **Reconcile account** on Beacon's main menu and in the **Statement End Balance £** field, enter the ledger's current balance. Leave **Statement End date** at the current date and click **Show**. If there are any transactions to be cleared, select them but **DO NOT** click the **Reconcile Account** button. If **Balance Difference = 0**, it is working correctly.

Fixing a **Balance Difference** problem is a two steps process. It can be started any time but ideally after completing year-end accounts and best immediately prior to financial year-end. If you use **Reconcile account** and wish to fix a **Balance Difference** issue, please submit a ticket to the Help Desk.

Roy Biggs

Farewell Message to Beacon Team

I have had the privilege of working with the Beacon Team for over three years now and will be very sorry to say goodbye when I leave the Trust at the AGM in October. It was a daunting prospect joining an established team that had already achieved so much, but I couldn't have been made more welcome. I have learnt a huge amount and have been blown away by the commitment and skills of the volunteers who spend so much time and effort making sure Beacon works for u3as. A highlight was actually meeting the core team face to face after 18 months of lockdowns and speaking several times a week on zoom calls. The improvements the team have made to the system and the support and training for u3as have been extensive, and I know this excellent work will continue to ensure that the system offers a great membership management system for u3as.

Thank you to the whole team – I will miss you!

Alison May

Head of Member Services



COMMUNICATIONS TEAM

Who we are and what we do

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