



Edition: 45

July 2025

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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 and Development Lead

We asked last month if there was anyone in the Beacon community that would like to join the Beacon Management team to support software testing. We have had a great response and I welcome the new members to our team.

We are continuing to look for people to join the team to help with training, both with delivery and development of training material. This is an important area of the Beacon team's work as it provides support and confidence to our users when getting started.

The Beacon team have developed four Enhancements for deployment this month. The first two, BT1965 and BT1966 help with the control of Group finance, in that BT 1965 allows a group to be attached to a financial transfer between Ledgers and BT 1966 enables financial transfers to be included in a Batch.

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Message from Beacon National Support and Development Lead (continued)

This will help when group money is banked and transferred between Cash ledger and Current.

We will follow these by deploying BT 1851 Gift Aid Chargeable and BT 1799 Grant account access to named users. Both of these have been the subject of recent Beacon training courses.

I thank you for supporting Beacon and hope that you have a very pleasant summer break.

Frank Bailey



FURTHER INFORMATION

Beacon Enhancements Specifications

The Beacon software is maintained by Siftware, a company that specialise in the standard technology Beacon is written in – the jargon includes PHP, MySQL and jQuery.

The Beacon team need to communicate to Siftware any changes required, and we do this by writing specifications. These describe the behaviour we expect and will include screen mock-ups and scenario descriptions along with what needs to be tested and documented in user guide updates.

The most complex enhancements have been in the area of Finance including Gift Aid. Experience has taught us that developing and deploying these in smaller chunks works better and is less risky than having major upgrades.

As well as incremental delivery, there is the design approach that new features need to be explicitly enabled. Examples include support for pending financial transactions and refunds. If a Treasurer doesn't need these features they don't see them – out of sight and out of mind. You can of course investigate them on your Demo site by configuring some financial accounts there.

Another finance design principle is to avoid upping the functionality of the Group ledger that is really only suitable for tracking petty cash. To do so would mean commissioning more code to replicate features present in the main ledger as unfortunately Beacon has not been designed to share logic. It makes sense for Groups needing more features to use a dedicated account in the main ledger. An update is being tested that will allow the Treasurer to allocate an account to a Group Leader so that they only see and work with that account. To do this currently a Group Leader would need to granted access to all the u3a's accounts.

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Beacon Enhancements Specifications (continued)

Also coming is the ability to split membership fees between the amount that qualifies for Gift Aid and the amount that does not.

Graham Tigg

Software Specifications Lead



Beacon Training News

June will see our last series of training until October. Looking over previous years there is less demand through the summer months, and we feel that we need a break.

We plan to update all session content over this period so we will still be busy.

One observation, we still receive requests to join a session as late as 24 hours before a session. While we do try to accommodate these people, I might suggest that this is somewhat late given that dates were sent out some weeks prior.

Also, I occasionally receive less than polite emails telling me that we must put on more training as members pay for Beacon and we are not doing a good job. The Beacon fee covers support and development of the software along with hosting infrastructure and management. The training that we organise, which typically has around 2,000 delegates each year, is provided at no cost by part of the Beacon Team who are all volunteers.

I would thank those who have taken the time to come back to us with feedback which helps us to improve our sessions, this is much appreciated.

John Alexander

Training and Documentation Lead

Beacon Hints and Tips

Finance

There is a lot of discussion over Reconciling Beacon finance. The purpose is to check that what Beacon says you have is what is in your bank account.

Obviously if you have multiple bank accounts then you will mirror this in your Beacon accounts and this procedure should be carried out on all.

The idea being to check each item in Beacon Account Reconciliation to the items on your bank statement.

To start the process, you select the account amount and date shown at the closing date on the bank statement.

Pressing 'Show' then displays all items in Beacon and if you tick them the Balance difference near the top should be £0.

You can save the process without the difference being zero and investigate any that do not match or do not appear.

If you save as stated, then those ticked and saved will not appear in the screen again.

User Guide 7.5 Covers this section.

How frequently you do this is up to the individual treasurer and I know experienced treasurers who do not save the reconciliation. You will however see the figures back to the last saved reconciliation so please be aware.

Your Site Administrator

Each live site has a person (Site Admin) who uses admin to sign into Beacon. They are your first point for assistance and help.

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Beacon Hints and Tips (continued)

It is important that should the person doing this role change, then you let the Beacon Team know. There is a procedure to follow in the User Guide 8.1.

As this is the point of contact for the Beacon Team it is imperative that any change is notified.

If I may add a personal comment, it can be disappointing to discover that a Site Admin has not shared Beacon News and other information we send with those in their u3a.

Forthcoming changes

BT1899 Gift Aid

The HMRC rules state that Gift Aid can only be claimed on the Membership component of the annual payment.

With Online Joining and Renewal, the system shows the amount paid but some people need to know what they have put for Gift Aid. We are updating the system to allow two amounts to be set, the total to pay and the total for Gift Aid claim.

BT1799 Group finances

Some while ago we added the facility for a Group Leader to see the ledger entries against their group. Some u3as would like the Group Leader to be able to put in these transactions.

We are going to add this feature.

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Beacon Hints and Tips (continued)

We are also aware of many Treasurers for whom this is not acceptable. Therefore, we are making this a feature that the Treasurer can switch on or not and only for specific Group Leaders. We are also suggesting that should a Group Leader be able to input a transaction that it is set to default to a Pending transaction until accepted by the Treasurer.

We understand that there will be concerns and questions over both of these changes so will run a couple of workshops to cover these two items.

Coverage of both will also be in the regular Treasurer's training in the autumn.

John Alexander

Training and Documentation Lead



Beacon User Statistics

As of the 4th July 2025, the number of live sites and their members, are shown below.

| u3as / Networks / Regions | Number |
|---|---------|
| u3as using Beacon | 643 |
| Members in these u3as | 305,105 |
| Networks / Regions using Beacon | 14 |
| u3as (11) / Regions (2) preparing to migrate to Beacon | 13 |
| u3as using Demo24/25 (Demonstration site) to investigate joining Beacon | 49 |

John Alexander

Training and Documentation Lead

John Hopkins

Support and Migration Lead

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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