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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**

Soon it will be Christmas 2025, and it is now ten years since Beacon went live. From its humble beginnings it is now used by more than 655 u3as. Over the last ten years the volunteer Beacon Team have managed more than two thousand software improvements and corrections. They have supported all the u3as that have chosen to use Beacon. I would like to thank the Beacon Team for the work that they have done over the years and are continuing to do so.

The Trust are entering a new phase of examining the digital requirements for managing the Trust and supporting u3as into the future.

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

The first part of the exercise is to select an external working partner to identify the requirements of u3a members, u3a management teams, Volunteer groups and the Third Age Trust, including Member help and support, Volunteer management and overall communications upgrade. The committee charged with the responsibility of identifying this partner organisation has already been formed and has had its first meeting. The Discovery phase of the exercise is anticipated to last up to 3 months.

Finally, the Trust are currently interviewing candidates for the position of Beacon / Siteworks Support and Development Officer who will be directly involved in managing Beacon and Siteworks and I am sure that they will have an involvement in the new Digital Services Platform.

As this is the last Beacon News before Christmas, I would like to wish all Beacon users and the Beacon Team a Merry Christmas and a happy and prosperous New Year.

**Frank Bailey**



## FURTHER INFORMATION

### Beacon User Acceptance Team

#### Helping to make Beacon better!

I recently joined the Beacon Enhancement Team as a system tester – a role I'd performed at some point in my previous working life. I made the mistake of not stepping back quickly enough when a volunteer was called for, and before I knew it, I found myself **"managing"** the User Acceptance Team (UAT)!

I was surprised to discover that the entire Enhancement Team is made up of volunteers – not even a paid admin person in sight. I really should have known better but all credit to those who have been keeping Beacon going for so many years.

Our UAT is small (currently just three of us) and is responsible for preparing test plans and scripts, running tests, and documenting the results. We aim to provide sufficient documentation for peer review of our testing so that we become more accountable to the Beacon Community. We will test all the changes made to Beacon, whether they're bug fixes or new enhancements. We are conscious that different u3as have different ways of working and that Beacon has to be all things to all people. We take this into account when testing but remember: **your bug is someone else's feature!**

Some changes are small – for example, a tweak to the label on a data entry field – while others are more complex and need extensive testing utilising a variety of test system users with various roles and privileges.

You may recall the recent issue in the online joining process, where everyone signing up online automatically Gift Aided their subscription, whether they'd ticked "yes" or "no". (Don't worry – it's being fixed!) As one of those affected, I am well aware of the importance of testing.

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## Beacon User Acceptance Team (continued)

In the last issue of Beacon News, Frank Bailey mentioned that having a dedicated testing team should reduce the chances of similar problems slipping into the live system in future – no pressure, then!

I'd really like to involve more Beacon users in testing, especially those who originally requested the changes. After all, who better to understand the requirement, confirm that the specification for the developers meets it, and check that the final implementation **does what it says on the tin**?

Hopefully, anyone willing to lend a hand won't need to go through the full volunteer induction process – but that remains to be seen. Each change ready for testing comes with its own test server, so testers never see any live u3a data. So that should mean that it's relatively straightforward to get involved.

If you'd like to help test your change (or anyone else's), contact me at [simon.pratt@beacon.u3a.org.uk](mailto:simon.pratt@beacon.u3a.org.uk) and either join the team or just sign up for some ad hoc testing.

**Simon Pratt**

Software Testing Lead



## Beacon Hints and Tips

### 1. Membership Renewal

We come across sites where the renewal is done by changing a member's record and putting in a transaction.

**Can we ask that this is not done.**

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Beacon Hints and Tips (continued)

The Beacon system is designed to work with renewals or joining, either following the process in the Menu under Membership Renewals or Add New Member. The only other proper method is to use the Online Join / Renewal process.

This is important as other ways create a number of difficulties, such as Gift Aid and Accounting, and to sort this out entails a lot of work.

Both proper processes are covered in detail in the User Guide:

[Add a New Member](#)

[Membership Renewals](#)

2. User Permissions

In the past some people have set it up so that a member who had to access Beacon, should have a different User Name and Password for each role.

With the development of Beacon, we have now improved the system so that we do not advise this procedure.

The recommended way is for a User to have a single User Name and for all of their roles to be selected as shown below.

System User Record

Member

Ingram, Alf

...

ukey 9225

Login user name

abc

User record last changed 25 Nov 2024 11:35

Save User

Delete User

Password

Users should normally set their own passwords.

New users are given a temporary password which they must change at first logon.

If a user has forgotten their password or cannot gain access with it,

press the button below to reestablish a temporary password.

Set Temporary Password

Roles

i

Users must be assigned to one or more roles.

Access privileges are granted through roles.

Select	Role
<input checked="" type="checkbox"/>	Administration
<input type="checkbox"/>	Business Sec
<input type="checkbox"/>	Chairman
<input type="checkbox"/>	checker
<input type="checkbox"/>	demo
<input type="checkbox"/>	Group Leaders
<input type="checkbox"/>	Groups Coordinator
<input type="checkbox"/>	Membership Secretary
<input checked="" type="checkbox"/>	Treasurer

Save Role Assignment

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## **Beacon Hints and Tips (continued)**

This means if a person leaves a role, their rights to say “Administration” are just de-selected and the user only remembers a single User Name and Password and only what they can see or do changes with, the Site Admin has an easier role and less problems with confusion over User Name and Passwords.

### **3. Financial Year**

We find sites who seem to think that they must align with the Trust Year or the Tax Year.

Stated simply it is the responsibility of the individual u3a to decide their Financial Year and their Membership Year.

It is worth considering keeping the two at different times in the year.

Your Treasurer will have their hands full dealing with the Year End without adding a lot of payments from renewals into the mix.

It can also make the Treasurer’s role easier if renewals do not happen near the start or end of a financial year. This removes the difficulty of payments into the “wrong” financial year.

In the final analysis this is governed by the individual u3a’s constitution and financial regulations.

### **4. Beacon Finance**

A request about starting the use of Beacon Finance.

When a u3a migrates to Beacon, they often do this without using the Finance section as starting the other aspects can be enough. Their Treasurer probably has a system that works and wants to carry on with it.

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Beacon Hints and Tips (continued)

What we often find though is that later the Treasurer or a subsequent Treasurer decides to change to using the Finance section.

This is where we ask that rather than just starting, that you contact us. There are a number of things to bear in mind.

4.1. Beacon will have recorded all your membership income since you went live and these need to be managed before starting using the finance.

4.2. Add setting up opening balances and general configuring of the finance and it can seem daunting.

In practice it is relatively easy but rather than struggle we are here to help.

5. Treasurers

In helping Treasurers with Beacon, I often find that they are not using the account labelled **Current**.

Finance Accounts				
	Account	Active		
Click to change Membership Payment Method Defaults				
2648	Current	✓	<a href="#">configure</a>	locked
3423	Membership	✓	<a href="#">configure</a>	<a href="#">delete</a>
3424	Social	✓	<a href="#">configure</a>	<a href="#">delete</a>
Add new account			<input type="text"/>	<input type="button" value="Save"/>
Group balances		<input checked="" type="checkbox"/> Display Group brought forward balances at the start of the financial year		

May I suggest that you do use this as it is meant to mirror your main bank account.

Should you want to rename it then by going to Finance Accounts, selecting configure you can change the name. In the illustration, on the next page, I have changed it to **Current edited** and then Save the change.

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Beacon Hints and Tips (continued)

Configure Account

Account name

Current edited

Pending transactions

Disable

Enable Refunds

☐

Save

As all of our tests and checking are based around this being the main account so you minimise any chance of problems.

Please contact us with any queries via [info@beacon.u3a.org.uk](mailto:info@beacon.u3a.org.uk) or if it is for the finance implementation go directly to John Alexander at [john.alexander@beacon.u3a.org.uk](mailto:john.alexander@beacon.u3a.org.uk), thank you.

John Alexander

John Hopkins

Training and Documentation Lead

Support and Migration Lead

Beacon User Statistics

As of the 1st November 2025, the number of live sites and their members, are shown below.

u3as / Networks / Regions	Number
u3as using Beacon	655
Members in these u3as	321,023
Networks / Regions using Beacon	17
u3as (6) / Networks / Regions (6) preparing to migrate to Beacon	12
u3as using Demo24/25 (Demonstration site) to investigate joining Beacon	47

John Alexander

John Hopkins

Training and Documentation Lead

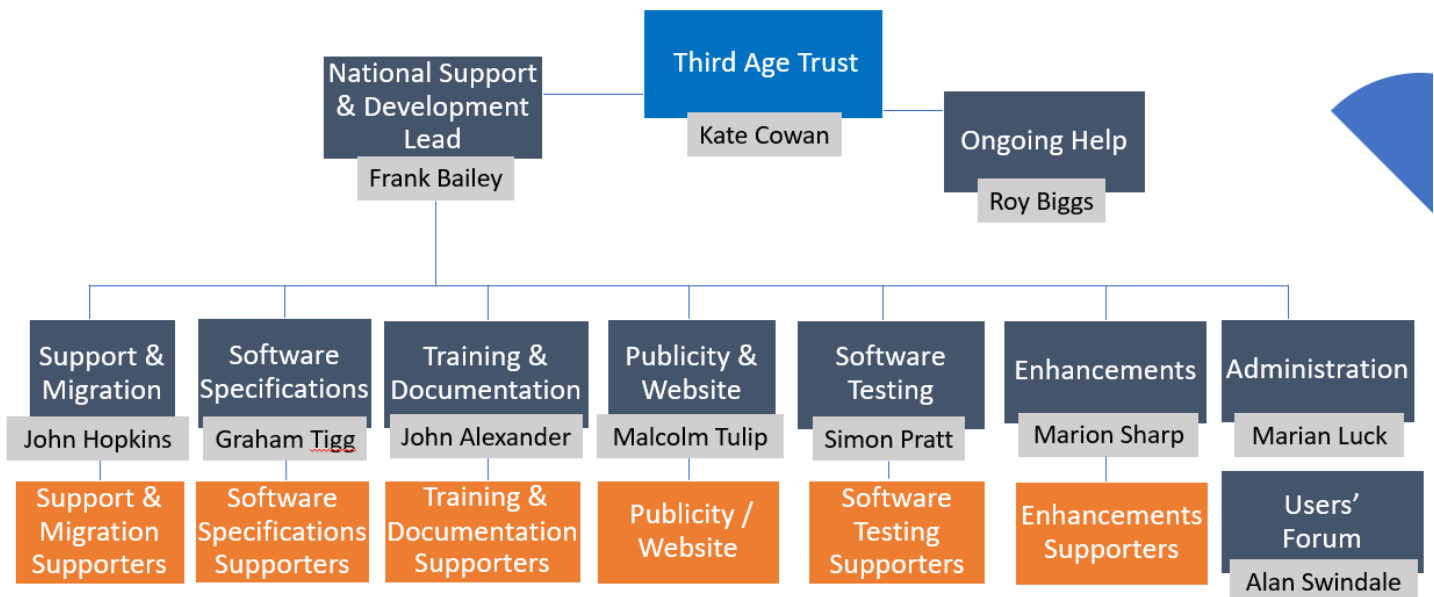
Support and Migration Lead



# BEACON TEAM

## Who we are and what we do

### Beacon Team Structure



Individuals can have multiple roles and hence be in several Supporter roles

### 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/Networks/Regions in the UK that wish to take advantage of it. More information about Beacon can be found through the link to the website.

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