u3a Beacon

BEACON *NEWS*

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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

As Beacon approaches seven years in general use we look forward to the milestone of 500 u3as using it. This is a time to reflect on the progress we have made, the positive and on occasions, I have to say, not so positive occurrences.

During the life of Beacon there have been many changes in Government Legislation such as GDPR which has required u3as to have a recognised system for keeping control of their data. As we work forward to upgrade Beacon, to identify and correct critical bugs in the system and introduce enhancements to benefit all users.

In September we are introducing regular server maintenance times, which will happen at **10.30am on the first Tuesday of each month going forward.** We ask that all u3as do not log in at this time or you may lose unsaved data. **The downtime will vary from 5 to 15 minutes . Please do not attempt to log in during the maintenance period.**

Much recognition needs to be given to the progress we have made over the last seven years to the volunteer u3a members who have offered their services to move Beacon forward. The Beacon Team support u3as in variety of ways, including Training, Help Desk, Documentation and assistance to u3as nationally.

Frank Bailey

Beacon Finance

Two new articles have been added to the **User Guide** that give advice about setting up Beacon Finance:

7.10.2 *Setting up Beacon Finance* deals with 2 scenarios:

(a) using beacon Finance from Day 1, that is from the date agreed by the u3a to start using Beacon.

(b) starting to use Beacon Finance at a later date, which often happens when the treasurer in post, at the time Beacon is adopted, is disinclined to use Finance but the successor is keen to use Finance.

7.10.3 *Resetting Finance after a period of non-use*

This deals with the more complicated situation where a u3a did use Finance initially, then stopped for a few years, then decided to revert to using Finance.

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The Beacon Enhancement Process *– from Alan Swindale*

Everyone who uses Beacon has ways in which they would like it improved, to incorporate features they find in other computer applications, to make it faster, to make it easier to use. Surely this must be possible? The answer is yes, but …

But what? The first constraint is cost, the second constraint is time. Microsoft Excel has over 750 million users and has been developed and refined since its first release in 1985. The u3a movement doesn't have the budget that would come from 750 million users and Beacon is over six years old.

This note aims to explain how the Beacon enhancement process is being managed.

Some suggested very desirable improvements which would require Beacon to be re-written from scratch. This had been considered but was judged too expensive and instead it was decided to ask for an existing product to be tailored to the u3a movement's requirements. Suffice to say that this approach did not turn out happily and the long-term future for Beacon is not yet decided. Meanwhile Beacon software changes were limited to essential changes only – security fixes, legal requirements and changes required to maintain / restore basic Beacon functionality.

The Beacon Enhancement Process (continued)

A backlog of suggested enhancements has been building up. In March the Beacon team was authorised to use a limited amount of the Beacon software support contractor's resource to fix residual minor bugs and implement minor, cost-effective, enhancements.

A Beacon Enhancement Team of experienced Beacon volunteers has been set up to review the backlog of identified enhancements and prioritise them on the basis of benefit versus effort required from our software support contractor. The benefit and level of demand is assessed from the Forum contributions, Help Desk submissions and the experience of the Enhancement Team.

If this triage process concludes that the enhancement should be implemented then the enhancement request is investigated in detail and a specification for the change is written by the Enhancement Team. Enhancements are grouped into packages of related changes for efficiency in coding and testing.

Not all desired changes can be implemented by a simple coding change. At the suggestion of our software contractor, the slow response of Beacon (at times) is being tackled by transferring the processing of emails and downloads to a second server.

The specifications are discussed with the contractor who will then start modifying the code and testing the modification. Once the contractor is satisfied with the change it is released to the Beacon team for an acceptance test. Provided the acceptance test is passed a service notification is written by the Team to alert the general Beacon community of the impending change and documentation is updated if required. The package of changes is then deployed on the working system. Feedback via the User Support Forum and the Help desk is monitored to check that the change is operating successfully and that there are no adverse side effects. After a minimum period of a month of trouble free operation the enhancement is closed out.

The Beacon Enhancement Team meets every two weeks to monitor progress and sort out any problems that arise. Two members of the team meet with the software contractor regularly once a week and ad hoc meetings are arranged if necessary.

Beacon News

Work is in progress for all editions of Beacon News to be accessed under the Newsletters page of the website.

Beacon for Networks and Regions *– from John Alexander*

As reported recently, two pilot sites are being trialled to assist affiliated networks in the use of Beacon. The two sites are up and working and have started to use the system to communicate with their member organisations.

While the aim is to make their operations better, it might also help other u3as to see the benefits. It is reiterated that the sites are using a standard Beacon system with no changes. The Beacon team are working with these two sites to see how it works in practice before setting up further sites.

Any Network interested in using the Beacon system for this purpose should wait until the pilot process has concluded before requesting to use this facility.

This work is not deflecting the key aim of the team which is to provide a good facility to u3as.
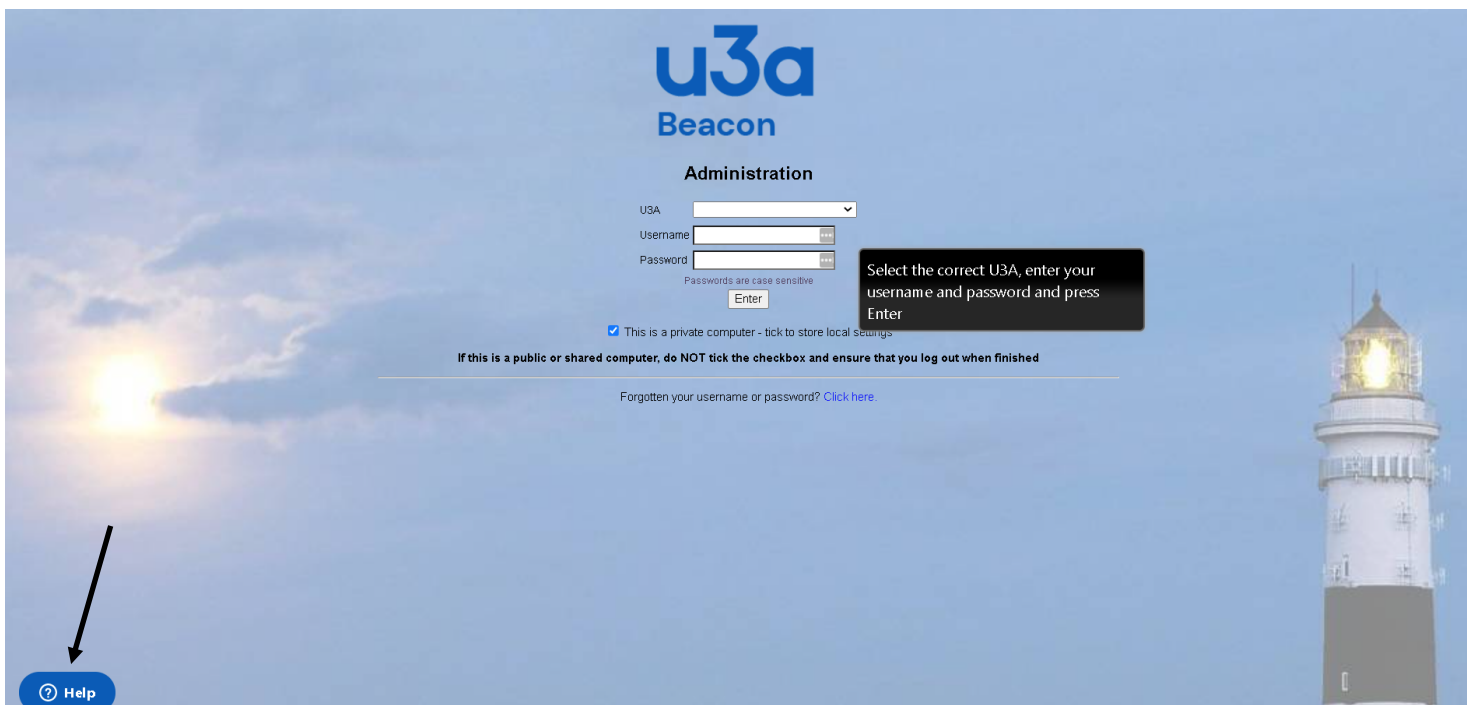
Beacon Help Centre

In early August the Help Centre widget on Beacon was deployed. This will give direct access from most Beacon pages to the User Guide and other Help Centre articles.

The widget will appear on the bottom left of the screen, to avoid the scrolling arrow on some pages, see screen shot below.

Click on it to open so that a search term can be entered.

Migration Team *– from Graham Tigg*

When a u3a adopts Beacon the assistance provided by the Beacon Team of Supporters covers all aspects. Starting with introductory presentations, the basics of using Beacon, a demo playpen system (Demoton) it moves to guidance on the processes and roles to get things done. Post–live the Supporter is there to help bed down the system. There is also a small team of specialist Supporters – the Migration Team. In a sentence we create Beacon sites and upload u3as' data to populate them.

One of the founder members Stephen Shipley will be standing down from the Migration Team at the end of September. Stephen migrated my u3a Hammersmith & Fulham back in 2017 and proceeded to recruit me into the Team, so I am going to be the first to tip my chapeau to Stephen and wish him all the best.

With Lesley Asman also leaving us at the start of the year the Team was down to three – John Hopkins (who also looks after our Supporters), Graeme Bunting (author of much of our User Guide) and myself. To bring our numbers back to five, I have recruited two replacements and would like to welcome Brian Lowes and Paul Moss. Brian and Paul are both experienced Supporters with an appetite for data.

So what do we do exactly? Basically we work with the Supporter and u3a as necessary to prepare data for upload, a process that involves populating a spreadsheet with membership records and often Groups details. Some u3as even include their financial ledgers. Like all database systems there are rules about how the content is structured and what is allowable. This ranges from breaking up addresses into components through to ensuring phone numbers are not actually numbers so we preserve the leading zero. While the scale of the task varies, we can say in general the more a u3a has put off tidying up data the more work we face. I'd like to think that looking back most u3as have that rewarding feeling of satisfaction which only a good data spring clean can give us.

Beacon Video

'Video – How Beacon Works – A Quick Demo' is now available to view from the website [Home page](#). This short video will help you understand the power of Beacon and why it's a valuable tool that can make managing your membership database easily.

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Beacon Membership Record

Two articles of the **User Guide** (4.2 and 10.2) have been amended to include information on the sizing of photographs for the membership record.

Note: The picture must be saved as jpg, png, or gif, maximum file size 2MB. A square format photo (aspect ratio 1:1) is advised to suit the space on the membership card. Photos can be cropped to a square using a smartphone app or other photo editing software.

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COMMUNICATIONS TEAM

Who we are and what we do

Name	Role
Neil Stevenson	Team Leader
Tony Darbyshire	Webmaster
Malcolm Tulip	Assistant Webmaster
Alan Swindale	Forum Moderator
Malcolm Tulip	Newsletter Editor

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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