

BOURNE U3A

BEACON HANDBOOK

FOR

**COMMITTEE MEMBERS AND
GROUP LEADERS**

Group Leaders Introduction to BEACON

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Group Leaders Introduction to BEACON

Questions	Answers
I have forgotten my user name and/or password.	Contact Chris Searl by Telephone: 01778 422518 E Mail: webmaster@u3abourne.org.uk
Do you need a PC or laptop to access BEACON ?	If you can access the internet and know your user name and password, you can use any device to access BEACON .
I am a leader of two or more groups so will I need a different access facilities for each of them?	No. You will be given one User Name and password will enable you to access each of your groups.

What will happen when you are offered the chance to use **BEACON**?

1. You will be offered a training session if required – many users find these notes sufficient.
2. The System Administrator will email you giving a USER NAME and PASSWORD together with the URL of the **BEACON** site.
3. If you lead several groups, one USER NAME and PASSWORD will suffice to access all the groups of which you are leader.
4. Once these are available, you are ready to start using the system.

Group Leaders Introduction to BEACON

HOW TO USE BEACON

Many of these instructions are involved in the initial set up of your individual group page only. Throughout the system a short, helpful message will appear if your cursor hovers over a box.

Stage	Action	Notes	√
1a	Using your web browser, Log on to BEACON using the URL you have been given	You may like to bookmark the site to enable easy access in the future.	
1b	Find Bourne on the list of U3As		
1c	Enter your USER NAME	Both supplied by the System Administrator	
1d	Enter your PASSWORD	Probably a good idea to copy these from the e mail to the BEACON screen. You cannot change your USER NAME but must change your password on first access.	
1e	If this is your own computer Tick the box “ This is private computer etc ”	<i>If you using someone else's computer or at a library etc. DO NOT tick this box</i>	
1f	Click Enter		
The Administration screen will appear:			

The Administration screen will appear:

U3A Bourne
THE UNIVERSITY OF THE THIRD AGE

Administration

You are logged in as Chris Searl [Log Out](#)

Membership	Groups	Finance	Misc	Set up
a Members	b Groups		e U3A officers	
	c Venues		f Personal preferences	
	d Calendar			

[U3A Beacon Users' Forum](#) [Beacon User's Guide](#) [Beacon Change Log](#)

Hover mouse over captions for more information

Group Leaders Introduction to BEACON

It is essential that you change the given password on the first occasion you use the system but you may like to change it regularly.

The [Personal Preference](#) screen:

Personal Preferences

Drop-down name lists & Timeout

Sort by ☐ Surname ☐ Forenames

Show ☐ Surname first ☐ Forenames first

Session timeout minutes

Minimise timeout if this is a shared computer (max 20 mins)

[Save Name Lists & Timeout](#)

Change password for Chris Searl

Passwords should comprise between 8 and 15 characters including at least one upper case, lower case and numeric character. Do not use common words. You may optionally consider using the following special characters: _ - \$ ^ % ! # < > .

New password

Confirm

[Change Password](#)

Change personal Q&A for Chris Searl

Question

Answer

[Update Q&A](#)

[Home](#)

2a	<p>Click Personal Preferences (labelled f on the Administration screen)</p> <p>Enter your chosen password twice</p> <p>Click Change Password.</p>	<p>Remember this changed password as no-one else will know it. If you forget it you will not be able to access information without contact with the BEACON Administrator who can issue a new temporary password.</p>	
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Group Leaders Introduction to BEACON

2b	Amend Drop-down name lists & Timeout and/or Change Personal Q&A if needed Click the appropriate confirmation boxes	Advise that the Timeout is left at 20 mins. You can change the question if you wish.	
2c	Click Home to return to the Administration screen		

Group Leaders Introduction to BEACON

In order to complete your groups information you will find it helpful to know the membership numbers of your group members but this is not essential.
If you know these already, you can skip steps 3a and 3b.
You can also add members by using their name.

3a	To access the membership database Click Members under Membership (labelled “a” on Administration screen)	A full list of members appears A large arrow in top or bottom right corners take you to the top or bottom of the list, otherwise scroll using scroll bar on the right side. As a group leader you are not able to change any member’s record. This can only be done by the Membership Secretary so you should ask members to notify him if you become aware of any changes	
3b	Make a note of all relevant membership numbers. Click the Home button at the top or bottom of screen to return to the Administration screen		

List of Members screen – top and bottom

The screenshot shows the 'Members' screen with the following elements:

- Search Bar:** Labeled 'a', containing 'Quick Find' and a 'Search' button. A checkbox for 'Include criteria below' is also present.
- Status Filter:** Labeled 'b', showing 'Status: ☒ Current ☐ Deceased ☐ In Progress ☐ Lapsed ☐ Resigned'.
- Poll and Class Filters:** Labeled 'c', showing 'Poll: - any or none -' and 'Class: - any -'.
- Payment Type Filter:** 'Payment type: - any -'.
- Instructions:** 'Use Quick Find or select filters above to customise list of members. Perform operations on list at bottom of page.'
- Letter Selector:** A row of letters A-Z. A red callout box points to it with the text: 'select letter to go to surnames starting with that letter'.
- Members List Table:**

Select	No	Name	Address	Telephone	Class	S
▲ ▼		A				
<input type="checkbox"/>	855	John Aaaaleave	1 High Street, Blockley, WR12 7RA		Individual	C
<input type="checkbox"/>	831	Brian Aaathackeray	29 High Street, Broadway, WR12 7RA		Individual	C
<input type="checkbox"/>	830	Apple Aaathackeray	555 High Street, Brighton, WR12 7RR		Individual	C
<input type="checkbox"/>	443	Alan Abbey	72 Tanning Ave, Watford, LU5 4TS	01734 656564	Individual	C
<input type="checkbox"/>	569	Abernathy Abernathy-abernathy	Montezuma Hall Caepanttywl Crescent, Near B4347, Aberystwyth, HR2 0QE		Individual	C
<input type="checkbox"/>	783	Patricia Abrahamsen	15 Some Street, Twickenham, TW2 3XX		Individual - TAM	C
<input type="checkbox"/>	456	James Abrahams	43 Chocolate Bay Street, Andover, SP10 3PD		Individual	C

Group Leaders Introduction to BEACON

		Y				
<input type="checkbox"/>	79	Mary Yeats	The Tower , Gort, Grimscoote, Higham, East , Sligo, GL99 9AB	01242 678456	Individual	Cu
<input type="checkbox"/>	65	William Yeats	The Tower , Gort, Grimscoote, Higham, East , Sligo, GL99 9AB	01242 678456	Individual	Cu
<input type="checkbox"/>	221	Paul Yernakas	1 The High Street, Behind The Coop, Swareham, BH20 9XQ	01929 123654	Individual	Cu
<input type="checkbox"/>	352	George Young	15 Sea View, Seahouses Road, Bamburgh, TD15 6HY		Individual	Cu
<input type="checkbox"/>	349	George Young	15 Sea View, Seahouses Road, Bamburgh,		Individual	Cu
<input type="checkbox"/>	772	Mike YOUNG	16 16 Marks Tey Road, Stubbington, FAREHAM, PO14 3LE	07	Individual	Cu
<input type="checkbox"/>	17	Bob Younger	56 North Street, Glevum, GV4 6TT		Joint	Cu
<input type="checkbox"/>	18	Diane Younger	56 North Street, Glevum, GV4 6TT		Joint	Cu
		Z				
<input type="checkbox"/>	497	A Zappa	1 One Road, BRISTOL, BS1 1AA		Joint	Cu
<input type="checkbox"/>	498	B Zappa	1 One Road, BRISTOL, BS1 1AA		Joint	Cu
<input type="checkbox"/>	499	C Zappa	1 One Road, BRISTOL, BS1 1AA		Individual	Cu
<input type="checkbox"/>	176	Caitlin Zilpa	House 1 Street 1, Parish 1, Swannsville, YO1 0LP	07924776388	Individual	Cu
Select	No	Name	Address	Telephone	Class	S
<div> <input type="button" value="Do with selected"/> <input type="button" value="Send E-mail"/> </div> <div>833 members (0 selected)</div> <div> <p>Select operation to be performed in the drop-down list above, select the members on whom to perform the operation with the checkboxes on the left (click on Select column header for preset selections menu), then press 'Do with selected'.</p> <p style="text-align: center;"> Home - Add New Member </p> </div>						

Group Leaders Introduction to BEACON

4a	<p>Click Groups (shown as “b” on the Administration screen) and a list of all groups will be shown.</p>	
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List of groups screen

Groups

Faculty - any or none - Show active only b

click on letter to go to groups beginning with that letter

Operations at bottom of page

Select	Group	Active	When	Where	Leaders	Members	Max
▲ ▼	A						
<input type="checkbox"/>	Antiques	Y					
<input type="checkbox"/>	Anytime Out	Y					
<input type="checkbox"/>	Art	Y					
<input type="checkbox"/>	Art History 1	Y					
<input type="checkbox"/>	Art History 2	Y					
<input type="checkbox"/>	Aviation History	Y					
▲ ▼	B						
<input type="checkbox"/>	Basic Cookery(for men)	Y					
<input type="checkbox"/>	Birdwatching	Y					
<input type="checkbox"/>	Bourne U3A Players	Y					

<input type="checkbox"/>	Wayfarers Walking Gp	Y	2nd and 4th Tuesday Mornngs every Month	Where Notified By Walk Leader	Bill Reid	7	
<input type="checkbox"/>	Wine Appreciation 1	Y	2nd Friday evening, every month	At Members Homes	Peter Birch	12	12
<input type="checkbox"/>	Wine Appreciation 2	Y	3rd Friday Evening every month	At Members Homes	Gerry Blacoe	2	12
<input type="checkbox"/>	Wine Appreciation 3	Y	3rd Friday Evening every Month	At Members Homes	John Boss	2	12

Select Group Active When Where Leaders Members Max

Do with selected Send E-mail to leaders ▼

62 groups; 22 leaders (0 selected)

Select operation to be performed in the drop-down list above, select the groups/leaders on whom to perform the operation with the checkboxes on the left (click on Select column header for preset selections menu), then press 'Do with selected'.

4b	<p>Find the group of which you are the leader</p> <p>Click on the name of it</p>	<p>It/they will be highlighted in blue.</p>
4c	<p>A Group Record screen will appear for your Group set to the Details screen.</p>	<p>The first time you use the system, you will need to complete this screen</p>

Group Leaders Introduction to BEACON

Group Record Screen

Home - Groups List - Venues - Add New Group

Group Record for Discussion Group

Click to display the list of all groups

1 Details 2 Schedule 3 Members 4 Ledger

Group Details

Group

Faculty ▼ Status Active Max members a

☐ Allow members to join on-line
☒ Enable waiting list
☒ Notify leader of changes b

When

Normal start time d End time e Contact f

Venue ▼ g

Information h

Notes i

Group record created 4 Aug 2016 16:38; last changed 14 Aug 2016 09:32

Save Record
Delete

5a	Faculty	Ignore – not used by Bourne U3A	-----
5b	Status	Leave as Active	-----
5c	Max. Membership	Add a figure if there is a maximum number Otherwise leave blank	
5d	Allow members to join on-line	Ignore – not used by Bourne U3A	-----
5e	Enable waiting list	Tick if you have the maximum number of members and this will trigger a waiting list	
5f	Notify leader of changes	Tick this box	
5g	When	Brief details of when the group meets	
5h	Start and end times	Click in the box then use the hour and minute slider to set the times.	
5i	Choose a venue from the drop down list	If a different one is required, contact the Group Co-ordinator	
5j	Information	Anything in this box could appear on the website at a later stage (optional)	
5k	Notes	Can only be seen inside BEACON (optional)	
5l	Click Save Record		

Group Leaders Introduction to BEACON

6a	Click Schedule on the Group Record screen	Meetings already scheduled (if any) will appear.	
<div> <div>Add Events screen</div> <div> <div>Add Events</div> <div> First date and time <input type="text" value="14/08/2016 10:00"/> ^a then every <input type="text" value="2"/> <input type="text" value="Weeks"/> ^b Until <div> <input checked="" type="radio"/> Number of events <input type="text" value="1"/> ^c <input type="radio"/> Not beyond <input type="text" value="31/1/2017"/> ^c </div> End time <input type="text"/> ^d <input type="checkbox"/> Exclude from public calendar ^e Venue <input type="text"/> ^f Enquiries <input type="text"/> ^g Topic <input type="text"/> ^h Details <input type="text"/> ⁱ <div>To add a single event, set Number of Events to 1</div> <input type="button" value="Add Events"/> ^j </div> </div> </div>			
6b	First date and time	Insert the date of the next meeting of your group	
6c	Then every	Choose from drop down menus	
6d	Until	This be either : 1 if you are having a special event Any figure if you are talking about a regular meeting or : An end date can be inserted	
6e	End time	Add the usual finishing time of your meetings	
6f	Exclude from public calender	Tick (so that the Calendar for public use on the website does not become overloaded)	
6g	Venue	Choose from drop down list	
6h	Enquiries	If you wish, add a contact telephone number or e mail address	
6i	Topic	You can add a subject for each meeting (optional)	
6j	Details	A longer note could be inserted here (optional)	
6k	Click Add Event	when finished.	

Group Leaders Introduction to BEACON

7a	Click Members on the Group Record screen	You will see the Group Leaders name has already been inserted. If this changes, please notify Group Co-ordinator but see below for the method of amending it on BEACON	
<p>There are two ways to add Members to a group</p> <ol style="list-style-type: none"> Using the member's name which is quicker if just one name is to be added. Using the membership numbers as shown below – this can be done for multiple numbers and is quicker if you know them. <p>Add member by name or membership number screen</p> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px;">Add member by name</div> <div style="background-color: #ffcc00; text-align: center; padding: 10px;"> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px 20px;">- select member -</div> <div style="background-color: #ccc; padding: 5px 10px;">▼</div> <div style="background-color: #ccc; padding: 5px 10px;">Add</div> </div> <div style="background-color: #0056b3; color: white; text-align: center; padding: 5px;">Add member by membership number</div> <div style="background-color: #ffcc00; text-align: center; padding: 10px;"> <div style="border: 1px solid #ccc; width: 200px; height: 20px; margin: 0 auto;"></div> <p style="margin: 5px 0;">Separate numbers by commas</p> <div style="background-color: #ccc; padding: 5px 10px; margin: 0 auto;">Add</div> </div> <div style="background-color: #0070c0; color: white; text-align: center; padding: 10px;"> Home - Groups List </div> </div>			
7b	<p>Go to Members page</p> <p>Tick the member's name</p> <p>Go to bottom of Members page</p> <p>Click on the arrow beside <i>Send an E Mail</i> and see list of actions</p> <p>Click on <i>Add to group</i></p> <p>Choose <i>Select Group</i></p> <p>Choose appropriate Group Name in the box which appears</p> <p>Click <i>Do with selected</i></p>	This is easiest way to add a member	
7c	<p><u>To add members using Membership Number</u></p> <p>Type all Membership Numbers separated by a comma but without spaces until all are included. If you include spaces, an error message will appear which can be ignored.</p> <p>Click <i>Add</i></p>	The box appears small but takes many numbers.	
7d	<p><u>To add members using Name</u></p> <p>Click the down arrow and a list of names will appear</p> <p>Click the required name</p> <p>Click.<i>Add</i></p>	Take care to ensure that you use the correct name as several members have the same name combination e.g. John Smith!	

Group Leaders Introduction to BEACON

7e	<p>Whichever method you use, you will see a list of names. To confirm the names Click on add selected members and a list of the members' details will appear.</p>	<p>If a box appears on the left side with a red line, the member does not have e mail. If you know differently please notify the membership secretary!</p> <p>Provided the status is shown as current, the member has paid the current year's subscription.</p> <p>After the 31 January each year, names of members who have not renewed will appear in red.</p> <p>It is also possible to check the names of members who have resigned by deselecting members and clicking resigned on the members screen.</p> <p>If any other status appears, such as lapsed, the person should no longer attend the group. Tell the member they should renew by talking to the Membership Secretary. If no action is taken, the member will have to leave the group immediately.</p> <p>In the case of a death or a move out of area, the membership secretary should be informed.</p>	
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Group Leaders Introduction to BEACON

	<p>Adding a new group member after initial set up</p> <p>Log on as usual</p> <p>Click Groups</p> <p>Click your group's name</p> <p>Click Members</p> <p>Insert membership number or name at bottom of screen</p> <p>Click Add</p>	
	<p>Deleting a group member after initial set up</p> <p>Log on as usual</p> <p>Click Groups</p> <p>Click your group's name</p> <p>Click Members</p> <p>Find Members name</p> <p>Click remove on right hand side</p>	
	<p>Change the name of a group leader</p> <p>For this category, the Group Co-ordinator(s) must also be informed of these changes</p> <p><i>Note: It is possible to show two or more group leaders on the system if required.</i></p> <p>Log on as usual</p> <p>Click Groups</p> <p>Click your group's name</p> <p>Click Members</p> <p>Find Retiring Leaders name. Click Cancel Leader on right hand side</p> <p>Find or add new leaders name. Click Make Leader on right hand side</p>	
	<p>To e mail your group members</p> <p>Log on as usual</p> <p>Click Groups</p> <p>Click your groups name</p> <p>Click Members</p> <p>Tick left hand box of those names you wish to e mail</p> <p>Select Send an e mail from drop down list</p> <p>Click Do with selected</p> <p>E mail appears for you to compose and add an attachment if required.</p> <p>It can also be personalised by using the list of pre-input settings on the right hand side</p> <p>Click Send when complete</p>	
	<p>To contact any committee member, the webmaster etc.</p> <p>Log on as usual</p> <p>Using Misc. on the Administration screen</p> <p>Click on U3A officers</p> <p>Click on the box at the left side of the name to send an e mail (as described above)</p>	
	<p>At the end of each session</p> <p>Click Home</p> <p>Click Log Out on the Administration screen</p>	

Group Leaders Introduction to BEACON

Group Ledger on Group Record screen

If the balance shows in excess of £100 at any time, the excess must be lodged with the U3A Treasurer.

8a	Follow steps 1a to 1d on page 4		
8b	Follow steps 4a to 4b on page 9		
8c	Click Ledger on the Group Record screen		

The screenshot shows the U3A Bourne website interface. At the top is the U3A logo with the text 'THE UNIVERSITY OF THE THIRD AGE' and 'Bourne'. Below the logo are links for 'Home' and 'Groups List'. The main heading is 'Group Record for BEACON DEMO (Sky Diving)'. Below this are tabs for 'Details', 'Schedule', 'Members', and 'Ledger'. The 'Ledger' tab is selected, showing the 'Group Ledger' screen. This screen has a date range selector set to 'From 1/4/2016 to 31/3/2017'. It displays a table with columns: Date, Payee, Detail, In, Out, and Balance. The first row shows 'Brought forward' with a balance of '£ 0.00'. Below the table is a 'Download Excel' button. Underneath is the 'Add transaction' screen, which has a table with columns: Date, Payee, Detail, In, and Out. The first row has the date '16/02/2017' and a 'Save' button. At the bottom are links for 'Home' and 'Groups List'.

For the year 2017/8 only

If your group has submitted a return to the U3A Treasurer for the 2016/2017 year,

- The first entry in the [Add Transaction](#) screen must be dated 1 April and be the amount held by the U3A Treasurer on behalf of the Group.
- The second entry must be dated 1 April and be the Brought Forward figure from your 2016/2017 financial return to the U3A Treasurer.

If your Group joins this system later in the year, enter the [Brought Forward](#) as at the 1 April 2017 and retrospectively enter income and expenditure.

In subsequent years, the Brought Forward amount will be updated automatically.

There is a Statement facility which enables the Group Treasurer or Leader to look at accounts for previous years.

Group Leaders Introduction to BEACON

8d	To enter Income	The Detail field will only accept letters not symbols such as £ or / or –	
8e	In the Add Transaction box complete the Payee , Detail and the Amount information	The In (income) and Out (Expenditure) boxes will only accept numbers e.g. 35.00 or 22.75 Do not omit pennies e.g. 35	

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[Home](#) - [Groups List](#)

Group Record for BEACON DEMO (Sky Diving)

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Ledger

From 01/04/2017 to 31/03/2018

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00

[Download Excel](#)

Add transaction

Date	Payee	Detail	In	Out
01/04/2017	Bought Forward	from last year	30	

[Save](#)

[Home](#) - [Groups List](#)

8f	Press Save	The transaction is shown in the main table	
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U3A Bourne
THE UNIVERSITY OF THE THIRD AGE

[Home](#) - [Groups List](#)

Group Record for BEACON DEMO (Sky Diving)

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Ledger

From 01/04/2017 to 31/03/2018

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00
1 Apr 2017	Bought Forward	from last year	£ 30.00	£ 30.00	edit - delete

[Download Excel](#)

Add transaction

Date	Payee	Detail	In	Out
16/02/2017				

[Save](#)

[Home](#) - [Groups List](#)

Group Leaders Introduction to BEACON

8g	If you need to change a transaction, select Edit on the right side of the transaction		
8h	Make the changes you require and then click Update in the Balance column		

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[Home](#) - [Groups List](#)

Group Record for BEACON DEMO (Sky Diving)

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Ledger

From 01/04/2017 to 31/03/2018

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00
1/4/2017	Bought Forward	from last year	35		£ 35.00
					Update

[Download Excel](#)

Add transaction

Date	Payee	Detail	In	Out
16/02/2017				

[Save](#)

[Home](#) - [Groups List](#)

8i	The transaction is updated		
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[Home](#) - [Groups List](#)

Group Record for BEACON DEMO (Sky Diving)

[Details](#) [Schedule](#) [Members](#) [Ledger](#)

Group Ledger

From 01/04/2017 to 31/03/2018

Date	Payee	Detail	In	Out	Balance
		Brought forward			£ 0.00
1 Apr 2017	Bought Forward	from last year	£ 35.00		£ 35.00
					edit - delete

[Download Excel](#)

Add transaction

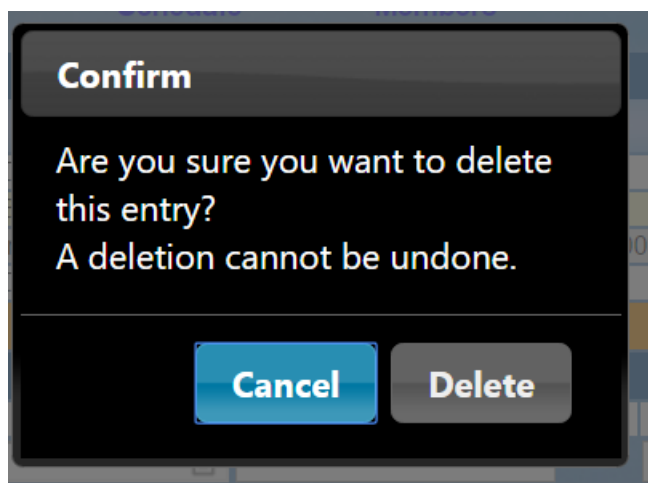
Date	Payee	Detail	In	Out
16/02/2017				

[Save](#)

[Home](#) - [Groups List](#)

Group Leaders Introduction to BEACON

8j	To remove an entry, click Delete on the right side of the entry		
8k	A warning is displayed Click Delete again	The transaction is removed	



Expenditure Entries

Complete the **Add Transaction** screen as before, adding **Payee Details** and ensuring the amount is entered in the **Out** column.

Note: Money lodged with the U3A Treasurer is Expenditure or **Out**

Money from the U3A Treasurer is Income or **In**

At the end of each session

Click Home

Click Log Out on the **Administration** screen

Group Leaders Introduction to BEACON

End of Financial Year - 31 March annually

9a	<p>For groups recording financial information</p> <p>The end of year information will be visible to the U3A Treasurer so there will be no need to send information as happened in the past.</p>		
9b	<p>For groups which do not take in or pay out Money.</p> <p>By the 31 March annually please record the following information.</p> <p>This information will be visible to the U3A Treasurer so there will be no need to send information as happened in the past.</p> <p>Date 31 March 20..</p> <p>Payment to U3A Treasurer</p> <p>Detail No money taken by this Group</p> <p>Input 0.00</p>		

Group Leaders Introduction to BEACON

REVISION LOG

Rev.	Date	Section	Changes
1	18 Aug 2016		Initial publication
2	23 Aug 2016	All	Minor changes
3	20 Sep 2016	All	Minor changes
4	21 Feb 2017	All	Deletion of Introductory page, some minor changes. Addition of Ledger Information and Indexing
5	26 Nov 2017	9	Addition of End of Financial Year recording information