Introduction to Beacon

1. What is Beacon?

Beacon is a database system designed and built by u3a members to serve the needs of u3a branches. Around 600 branches use it.

Beacon maintains records of individual branch members, interest groups and finances. It is safe and secure, i.e. information can't be permanently lost because Beacon is automatically 'backed up'.

It's important to understand the difference between **Branch Members** and **Beacon Users.** Every person who has joined the branch is a **Member** and has a record in Beacon holding their address, phone number and so on**.** Only **some members are Beacon Users.** These are people who need to look at and amend the information in Beacon, e.g. committee members and group coordinators.

This brief guide shows you how to find your way around Beacon. It is aimed at u3a members who hold roles in a u3a branch (e.g. on the branch committee or running an interest group.) and therefore need to interact with Beacon. If your branch uses Beacon then you will have a branch member acting as administrator (known as **admin**) who is in charge of maintaining your Beacon records.

In order to help people learn to use Beacon, an example database has been created for a fictitious branch called **Demoton**. You can play around with this example to find out how things work. The u3a has also authored several Beacon tutorials, often based on Demoton. Here we're going to guide you round this material so that you can easily learn for yourself.

2. Equipment

I'm assuming that you have your own computer. Since Beacon is software which runs across the internet (like an App), it hardly matters whether your machine is a PC or a Mac or an iPad.

3. Getting into Demoton

Your admin person will supply a password for Demoton.

- In your favourite web browser, go to https://demo.u3abeacon.org.uk
- choose **Howden Demo25** from the dropdown list of u3as
- make the user name **admin**
- enter the password your admin gave you

You'll then see something like

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This is the 'dashboard' for Beacon, from which you can run everything. You have been logged in as Jane Administrator.

4. Permissions

'Jane Administrator' is the administrator for this fictitious branch, so her dashboard covers everything in Beacon. Other **users** will have different views, e.g. the Treasurer will have access ('permissions') to the Finance column but not much else.

5. A brief tour of Beacon

The following tour is taken from this tutorial:

https://u3abeacon.zendesk.com/hc/en-gb/articles/360007514178-Demo-System-Getting-Started

Try clicking on the blue links on the dashboard to start exploring the system. Most of the other pages within Beacon have a blue link at the top or bottom of the page that takes you back to the Home page.

- Under the **Membership** heading, click **Members** to see a full list of members. Clicking any blue member name takes you to their **Member Record** which is where their details are stored.
- Under the **Groups** heading, click **Groups** to see a full list of Groups and Group Leaders (or Coordinators). Clicking any blue Group name takes you to the **Group Details** page from where you can also access the

Group **Schedule** (meetings), the list of Group **Members** and the Group **Ledger** (income & expenditure).

- Also under the **Groups** heading, click **Calendar** to see a list of future meetings and events. These are mainly drawn from the individual Group Schedules. *** We don't use this much ***
- Under the **Finance** heading, click **Ledger (by account)** to see the Treasurer's Ledgers (income & expenditure). There are several different accounts set up (Current, Deposit, etc.) which can be viewed by selecting from the **Account** drop-down list.

System Set-up

There are a few basic parameters that need to be set up before you use the system.

System Settings

Click **System settings** on the Home Page and refer to **User Guide: System settings**. Some of the parameters on this page will have been set up already and some can be ignored for the time being. The important ones to set up now are:

- **Membership fees**: select from the drop-down list to define if your membership fees are the same all year, or vary by month of joining ('rolling membership' is no longer supported).
- **Default Town, County and STD Code**: these values will be inserted during creation of new Membership Records. They can be overridden at the time of creating a new record. If a default STD code is left in place without the addition of the telephone number, it is automatically removed upon saving.

Press the **Update** button to commit the changes to the System Settings.

Membership Classes

Click **Membership classes** on the Home Page. You may add new classes, edit the names of existing ones, or edit the fees for any class as described in **User Guide: Membership Set-up**.

Finance Accounts & Categories

If you wish to use the Finance part of Beacon, click **Finance Accounts** on the Home Page to see a list of the accounts that have been set up already and click **Finance Categories** to see a list of the Finance Categories that have been set up.

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You may add new Accounts and Categories or edit the names of existing ones as described in **User Guide: Finance Set-up**.

Users and Roles
Each person that will have access to Beacon needs to be set up as a **User**, with one or more associated **Roles** such as Membership Secretary, Group Leader, Treasurer, etc.

You have been set up as the **Site Administrator** of your Beacon Demo site. This means that you have all privileges and can change almost any data for your site. Your allocated Supporter has been set up with a similar Administration Role and so will be able to see your data and help you with any questions that you may have.

Adding New Users
With the live system, most users will not be given such wide-ranging rights (or permissions) but will be assigned specific Roles with associated (limited) privileges.

To test how the privileges work, and to see the system from the point of view of an ordinary user, create a new User and assign them to one or more Roles as described below (also refer to **User Guide: System Users** and **User Guide: Roles and Privileges**).

1. Click **System users** on the Home page, followed by **Add New User**.
2. Select a fictitious member from the drop-down list and enter a log-in name (username) in the field below. Usernames can only have lower case letters or numbers with no blank spaces and should be personal to the user (e.g. jbloggs), rather than relating to a role (e.g. mem_sec).
3. Press the **Save User** button. A message with a temporary password pops up. Make a note of the Username and Password for when you log in as that user.
4. Select one or more Roles for the user by ticking the boxes next to the Roles and then press the **Save Role Assignment** button.

If you wish to set up some of your own U3A members as Users so that they can access the system, you may create a new User as described above and either:

- Associate their username with an existing fictitious member, or
- First create a new **Member Record** for your colleague as described in **User Guide: Add New Member** and associate the new username with the new Member Record.

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If you want to email from Demoton make sure the member record associated with your System user is set to your email address.

Members Portal
This gives access to on-line facilities for existing members, i.e. a more detailed **Groups List** and **Calendar**, on-line **Membership Renewals** and the facility for a member to update their **Contact Details** (refer to **User Guide: Members Portal**). To enter the Portal as a member, it is necessary to log in by entering the member's name, membership number, postcode and email address.

Public Groups List
This is a list of all your active Groups, with (optionally) details of when and where they meet, the contact person and details about the aims of the Group.

Public Calendar
This is a list of all future meetings and events, with (optionally) details of when and where, the contact person and a link that opens up a map of the location.

f) Beacon Users Forum
Your allocated Beacon Supporter is your first port-of-call for help and guidance, although you may also find answers to questions on the **Beacon Users Forum**. There is a link near the bottom of the Beacon Home page. Refer to **Beacon Users Forum** for more information.

And finally - Enjoy Beacon!

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