

Congratulations! Your Beacon Site is now 'live'. You (as Site Administrator) can now proceed with the system set up according to your U3A's requirements. By now you will have gone through the **Beacon Considerations** document that was supplied to you previously and so will have a good idea of the answers to questions Q12 to Q25, which form the basis of how you will define your Beacon System set up.

Set up must be completed before anyone in your U3A can use the system. It is important that you allocate the time to work through things gradually.

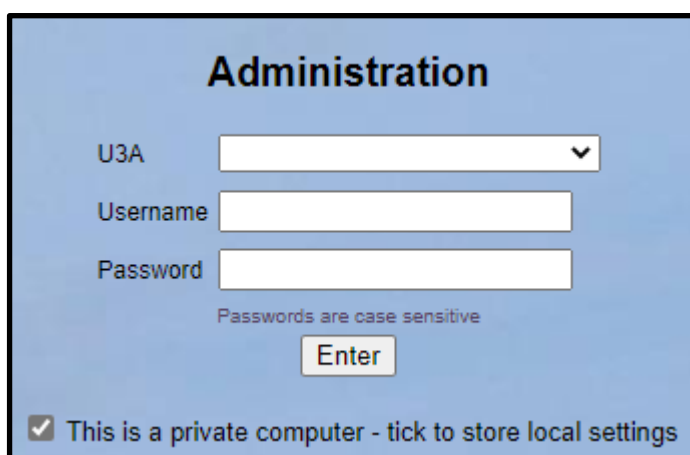
The information in this document is to be read in conjunction with the related articles in the **Beacon Help Centre**, which is a website dedicated to providing help and guidance for Beacon users - see Section (d) for more information about the Help Centre.

Clicking on the blue underlined links in this document will take you directly to the referenced Help Centre articles.

If you feel that you need more help or clarification, please contact your Beacon Supporter.

a) Connecting to Beacon

The first thing for you to do as Site Administrator is to log in to your Beacon site at <https://u3abeacon.org.uk>:



Administration

U3A

Username

Password

Passwords are case sensitive

This is a private computer - tick to store local settings

- **U3A:** (select yours from drop down list)
- **Username:** admin
- **Password:** sent to you in the accompanying email

After logging in you may be prompted to change your password and create a personal Q&A before you can carry on, as described in [2. Logging in as a System User](#).

If you forget your password, click the **Forgotten your username or password** link on the Beacon log-in page. After entering your Forename, Surname, Postcode and email address, followed by the answer to your personal question, you will be sent a new temporary password. If that doesn't work, contact your Migration Supporter.

b) Setting up the System

After logging in as Site Administrator you will see the following version of the Beacon Home page:



The screenshot shows a navigation menu with five main categories: Membership, Groups, Finance, Misc, and Set up. Each category has a list of sub-items. At the bottom of the menu, there are two links: 'U3A Beacon Users' Forum' and 'Beacon User's Guide'.

Membership	Groups	Finance	Misc	Set up
Members	Groups	Ledger (by account)	Audit log	System users
Add new member	Venues	Ledger (by category)	U3A officers	Roles and privileges
Membership renewals	Faculties	Ledger (by group)	Public links	System settings
Recent members	Calendar	Add transaction	Data export & backup	System messages
Non-renewals		Transfer money	E-mail delivery	Finance accounts
Membership cards		Credit batches	E-mail unblocker	Finance categories
Addresses export		Reconcile account	Personal preferences	Membership classes
Statistics		Financial statement		Member statuses
		Groups statement		Poll
		Gift Aid declaration		

U3A Beacon Users' Forum Beacon User's Guide

Go through the options under the **Set up** heading systematically and thoroughly and configure the site to your requirements using the referenced articles in the Beacon Help Centre and the [Questions](#) in the **Beacon Considerations** document (shown in blue below) for guidance.

System Settings

Click **System settings** under the **Set up** heading and refer to [8.3 System settings](#) to add the following:

- Membership card colour ([Q16](#))
- Phone number for public enquiries
- Email address for public enquiries
- URL for your U3A's website
- Email address for enquiries about joining or renewing online, if required - you probably won't wish to enable online membership at this stage ([Q23](#))
- Membership fees – 'same all year', or 'vary by month' ([Q12](#))
- Extended membership – the month from which new members receive more than 12 months membership for the same fee ([Q13](#))
- Advanced renewals period ([Q14](#))
- Grace lapse period ([Q15](#))
- Gift Aid – tick to enable claims for Gift Aid on eligible membership subscriptions ([Q20](#))
- Default Town, County and STD code when adding new members ([Q25](#))
- Paypal account email and return URL if online membership is enabled ([Q21](#))

Membership Classes

Click **Membership classes** under the **Set up** heading and refer to [8.7 Membership Set-up](#) and [Q12](#).

The four most common membership classes are provided (**Individual, Joint, Associate, Associate Joint**). You must edit these by entering the fees for each class before you attempt to add any new members.

If you require fewer or more membership classes, remove or add as necessary. The **Individual** class cannot be removed, but it may be re-named.

If you intend to make Gift Aid claims, having specific Joint or Family classes for people living at the same address could be to your advantage – see [7.8. Gift Aid](#).

If you have selected (in System Settings) for fees to vary by month of joining, there will be 13 fees to enter for each class (renewals being set separately from new member fees). Tick the 'Auto-propagate' box to copy entries to the right which will save a lot of typing.

Member statuses

Click **Member statuses** under the **Set up** heading.

Mandatory statuses are **Current** and **Lapsed**. Also provided are **Resigned** and **Deceased** which many U3As find useful. You may add your own statuses as described in [8.7 Membership Set-up](#).

Roles and Privileges

Click **Roles and privileges** under the **Set up** heading and refer to [8.2 Roles and Privileges](#) and [Q17](#).

Some commonly used Roles are provided, each with suggested privileges (Group Leader, Groups Coordinator, Membership Secretary, Treasurer, Administrator).

You may use, re-name or remove these Roles and change their privileges as you think fit and add more Roles if required.

Note that Roles refer to functions or 'jobs', not directly to people who are assigned to Roles. You should not normally need to make changes to Roles when the people fulfilling those Roles change.

Give careful thought to the assignment of privileges. For best security, always assign the minimum privileges required to carry out the duties of a Role. Do not offer the ability to delete details unless absolutely essential - mistakes do happen!

You should create or edit the Roles that you need before adding Users so that you can assign each User to one or more Roles.

System Users

Click **System users** under the **Set up** heading and refer to [8.1 System Users](#) and [Q18](#).

You will need to create user accounts for some of your current members to enable them to access Beacon and carry out the roles described above.

*Note: Your **admin** logon has full privileges for the site and can perform any operation. The Role called **Administration** has absolutely no defined relationship with the admin user (see [The Site Administrator](#) for more details about this).*

If the Site Admin needs to access to Beacon for non-admin functions (e.g. as a Committee Member or Group Leader), it is recommended that you have an additional and separate System User identity.

Finance Accounts & Categories

If you wish to use the Finance part of Beacon, click **Finance Accounts** under the **Set up** heading 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 already.

A PayPal account will have been provided if you asked for your site to be configured for on-line services. See the separate PayPal guide called **Beacon Online Transactions**.

Note that until Beacon is upgraded to a new payment system it is recommended that a PayPal account and the Online Portal are not implemented at this stage.

You may add new Accounts and Finance Categories or edit the names of existing ones as described in [8.5 Finance Set-up](#).

Polls

Click **Poll** under the **Set up** heading to see any Polls that you asked for on site creation.

You may add new Polls or edit existing Poll names as described in [8.7 Membership Set-up](#).

Custom Fields

Custom Fields are optional extra fields which may be added to the Membership Records page. They are non-functional and have to be set up by the Migration Team. You will have been advised to consider their use during your journey before migration, but you can still have them set up post-migration by raising a 'Ticket' with the **Ongoing Help Team** - see section (e).

*Note: a number of U3A's have found that it is better to use **Polls** rather than Custom Fields.*

System messages

Click **System messages** under the **Set up** heading (refer to [Q24](#)).

Sample messages are provided for pre-defined actions taken by Beacon. Modify them as you wish as described in [8.4 System Messages](#).

c) Other Considerations

Membership

If membership data has been imported to Beacon you should check that importing has not led to any data loss or corruption. Select **Members** under the **Membership** heading to view the Members List.

In particular: If there are any accents in your data (é, ö, etc.), please check that they have been converted correctly. It is not unusual for corruption if the data transfer involved different code sets. Check names with embedded upper-case letters, such as MacDonald and O'Brien. Member Records can be edited as described in [4.2 Member Record](#).

Groups

If Groups data has been imported to Beacon you should check that importing has not led to any data loss or corruption. Select **Groups** under the **Groups** heading to view the Groups List. Group Records can be edited as described in [5.2 Group Record: Details](#).

Venues

If Venues data has been imported to Beacon you should check that importing has not led to any data loss or corruption. Select **Venues** under the **Groups** heading to view the Venues List. Venue Records can be edited as described in [5.7 Group Venues](#).

Finance Ledgers

If it is intended to start using the Finance Ledgers with immediate effect, the current balances for each bank account should be adjusted by adding a **Transaction** where 'Detail' is set to 'Starting Balance' – see [Q19](#) and [7.2 Transaction Record](#).

Public links

Select **Public links** under the **Misc** heading to go to the Public Links page which lists URLs (web addresses) that can be incorporated into your U3A's public website to give access to the following online services:

- New member application (requires PayPal to be enabled)
- The Members Portal
- The public version of the Groups List
- The public version of the Calendar

You may also configure the following from the Public Links page:

- The functions available to members when they log in to the Members Portal (viewing the members' versions of the Groups List and Calendar, renewing membership online & updating personal details)
- The information shown in the Public and Members' Groups Lists
- The information shown in the Public and Members' Calendars

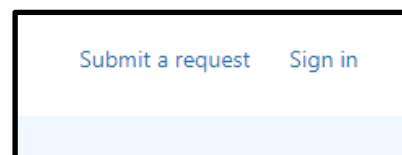
d) Further Help

In addition to your allocated Beacon Supporter, who is your first port-of-call for help and guidance, there are 2 other places where you can find help:

- The **Beacon Help Centre** has guidance on all aspects of Beacon. The [Using Beacon](#) section contains detailed instructions with accompanying pictures on such topics as Membership, Groups, Emails, Finance and System Set-up. The [Knowledge Base](#) section contains additional advice on how to get the best out of Beacon.
- The **Beacon Users Forum** allows users to ask for advice from other users and search to see if similar topics have been discussed previously, as described in [11. Beacon Users Forum](#). It also allows users to give feedback about possible bugs, usability issues and suggestions for new features. It is monitored by the Beacon Support Team who may respond to unresolved issues.

e) Raising a Support Ticket

If you have a Beacon issue that cannot be resolved by one of the methods described in Section (d) you can raise a 'Ticket' with the **Ongoing Help Team**.



Go to the [Beacon Help Centre](#) and click **Submit a request** at the top right corner of any page.

This will open up a form where you will need to add your contact details and describe the nature of the issue. You may attach files for further clarification.

The same method should be used if you wish to request changes to your U3A's Master Beacon configuration, e.g. to enable PayPal, add a Custom Field, change your Membership Year, etc.

Every support request is assigned a unique ticket number for tracking progress and viewing responses online. A complete archive and history of requests is maintained.

f) Version History

v3	2017-08-28	Lesley Asman	
v4	2019-03-12	Graeme Bunting	Major re-write
v5	2020-04-03	Graeme Bunting	Re-formatted to latest formatting standard. References to Beacon Training Material added.
v6	2019-07-10	Graeme Bunting	Minor changes
v7	2019-08-08	Graeme Bunting	Ongoing Help section added
v8	2020-04-27	Graeme Bunting	Introduction and Section (a) updated to reference the <i>Beacon Help Centre</i> . Section (d) 'Further Help' replaced 'Users Forum'. Section (e) 'Raising a Support Ticket' replaced 'Ongoing Help'. Hyperlinks to <i>Help Centre</i> articles added throughout.