# Lighthouse Guide 1: Getting Started

Welcome to Lighthouse! Lighthouse is the party's tool to help you manage your local party.

Within it, you'll find data on members, supporters and donors, as well as roles people hold in the party, financial contributions and a whole raft of other important information and useful processes.

This guide covers how to use the system, including what everything is and where to find it and a few more useful hints and tips.

## Contents

## Permissions Required

| | View | Edit | Create |
|---|---|---|---|
| **View Dashboard** | ✔<br>(Dashboard) | | |
| **Change organisation details** | | ✔<br>(Organisation) | |

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## How to log in to Lighthouse

Everything that we do in Lighthouse starts by being logged in! As data in Lighthouse needs to be kept secure, we use 2 factor authentication. This means the login process might be a bit longer than you're used to.
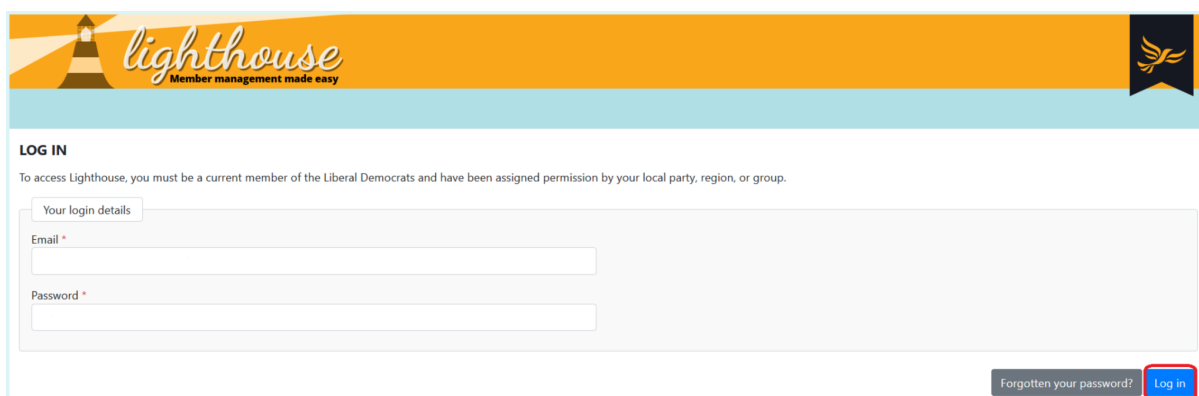
### Step 1

Open your web browser. In the address bar at the top of the screen, enter the following URL, then press enter. - http://lighthouse.libdems.org.uk/
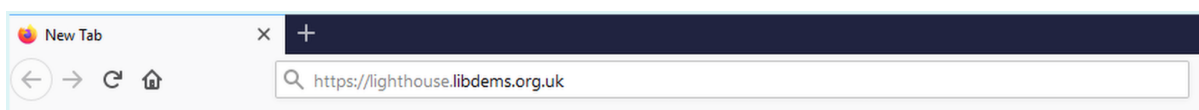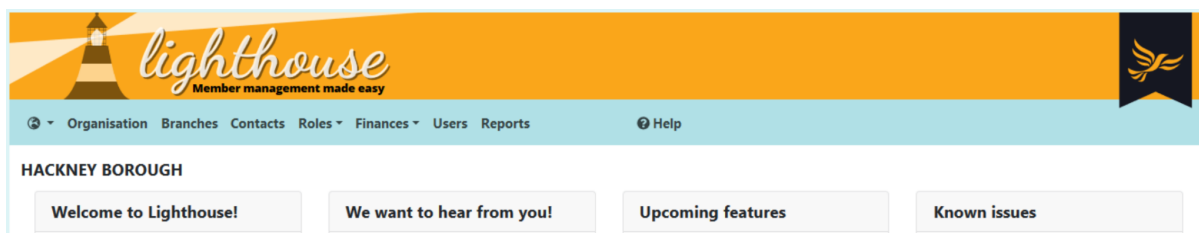


### Step 2

You will be directed to the login page. Enter your email address and password, then click "Log in".



### Step 3

You will be directed to the Dashboard page. Now you're ready to use Lighthouse!

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# Navigating around Lighthouse

After logging into Lighthouse, you will see a variety of options in the blue menu bar at the top of the screen. These are tabs and sub-tabs.

Each Tab or Sub-tab contains a different type of information to the others. The access you have will depend on the user access that you've been given.

## Switching Organisations

Data within Lighthouse is organised within organisations. These can be a local, regional or state party or even a party group. Organisations exist in a hierarchy, where organisations above you in a hierarchy can give your data, but you can't view theirs.

For example, if you're in a local party, you can see your data and your regional party can see your data, but you can't see regional data, or the data for other local parties in your region.

If you have access to more than one organisation you can switch between them quickly and easily by clicking on the globe icon in the top left of Lighthouse.
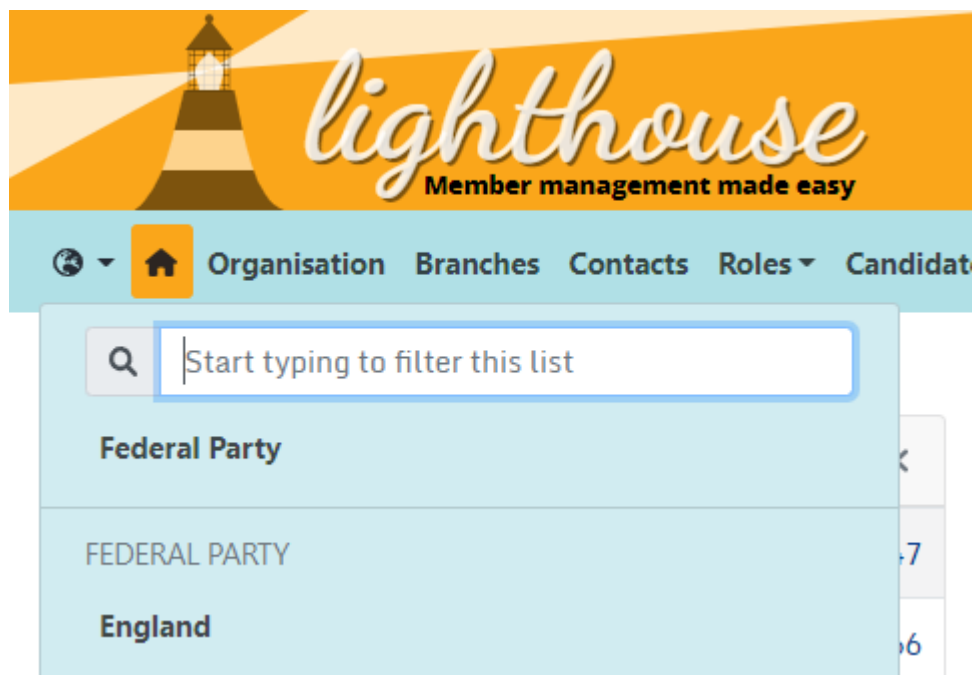
## Step 1

Click on the Globe icon in the top left of Lighthouse.



## Step 2

Start typing the name of the organisation that you want to change to. When it appears, select the organisation from the drop-down.
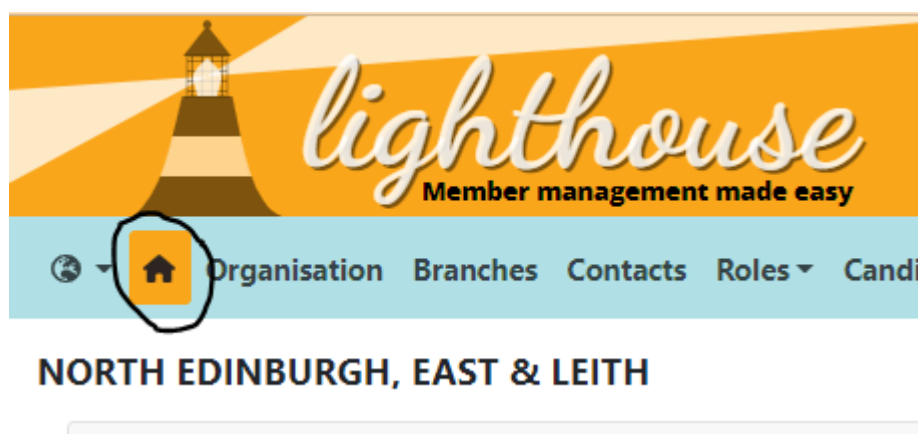
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You'll then see the dashboard reload and you'll see the name of the organisation that you switched to appear in the top left of the Dashboard.

**Home**

Wherever you are in the system, you'll always have the home icon. Clicking this at any time will immediately bring you back to the Dashboard.

You can see the home icon in the screenshot below:



**Tabs & Sub-tabs**

Tabs and sub-tabs are how information is organised within an organisation. Each tab or sub-tab contains a specific type of information.

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A list of all tabs and sub-tabs can be found below, it also includes a list of all of the user permissions required to view that tab or sub-tab. You can find out more about user permissions here.

| Tab | Sub-Tab | What it contains | Permissions required |
|---|---|---|---|
| **Dashboard** | N/A | Statistics on how well your local party is doing | View Dashboard |
| **Organisation** | N/A | Information that HQ has about your organisation and its bank accounts | View Organisation<br><br>View Banking |
| **Branches** | N/A | Information about branches and the members of those branches | View Branches |
| **Contacts** | N/A | Information about people in Lighthouse | View Contacts<br><br>View Donations (for financial information) |
| **Roles** | Campaigners | Information on people who have signed up to party campaign information lists | View Roles |
| | Electoral | Information on elected representatives & agents | |
| | Federal Party | Information on roles created by the Federal Party | |

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|  |  |  |  |
|---|---|---|---|
|  | Local Party | Information on roles created by the Local Party |  |
|  | System users | Information on who has access to party systems |  |
|  | Other | Any other party roles |  |
| **Candidates** | Electoral Areas | Information on electoral roles that are in your organisation | View Candidates |
|  | Elections | Information on elections being held in electoral areas in your organisation |  |
|  | Forms | Candidate application forms |  |
| **Finances** | Donations | Information on donations being made to your organisation | View Donations |
|  | Pledges | Information on donations you think might be made in the future |  |
|  | Loans | Information on loans made to your organisation and repayments on those loans |  |

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| | | | |
|---|---|---|---|
| | Donation Returns | Your PPERA (or donation) returns | |
| | Membership Rebates | Information on payments to your organisation from HQ | |
| **Training** | Courses | Information on training courses your organisation or you can run | View Training |
| | Sessions | Information on sessions of training courses you can run | |
| | Attendances | Information on people attending those sessions | |
| | Accreditations | Information on people's accreditation to use party systems | |
| | Trainers | Information on who can provide training within your organisation | |
| **Users** | N/A | Information on users who have access to the system | |
| **Reports** | Reports | Custom filters that have been created for you to show specific types of | |

|  |  |  |  |
|---|---|---|---|
|  |  | data in the system |  |
|  | Demographics | Information on the demographic breakdown of your organisation versus the UK and local averages |  |
| **Tasks** | Actions | Information on tasks you might want to take on as a volunteer | N/A |
|  | Problems | Information on issues you've reported to HQ | N/A |
| **Your name** | N/A | Information about your membership and access | N/A |
| **Help** | N/A | All of the Lighthouse help documentation | N/A |

## List Views

Within a tab or sub-tab, the first page you come to will be the list-view page. This displays records in a list and gives you a brief overview of the information contained in the record.

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## Record View

A record view then displays information about a specific record that you've accessed from a list view.



## Action Button

Action buttons are found at the top of list and record views. As the name suggests, they let you do things.
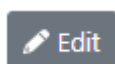


Edit is an example of a very common action button, which allows you to make changes to a record (you'll need at least edit permissions to that tab or sub-tab to view this action button!).

## Quick Link

Quick links are found on list views and within records. They allow you to quickly move around the system.

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The eye and pen icon above are examples of quick links. The eye takes you to a record view and the pen lets you edit the record.

**Information Panel**

Information panels are found within record views and help organise data relating to the record you're viewing.

> **Personal details**
>
> Greg Foster
> Created: 3 Mar 2022
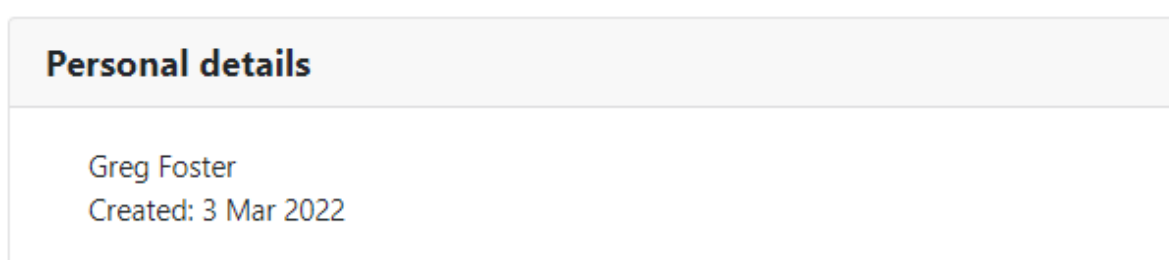
Personal details is an example of an information panel. All information panels have a header which indicates what kind of data is stored there and then contains relevant information about the record.

## How to use the Dashboard

The Dashboard gives you at-a-glance information about the health of your organisation, including key statistics, like how many members you have, graphs of performance over time, recent changes in the system and much more besides.

**What each dashboard component means**

There are a number of individual components to the dashboard and each one serves a specific function.

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Here is an explanation of what information each of these components shows you.

| Component | Explanation |
|---|---|
| **Welcome to Lighthouse** | Introduction to Lighthouse and links to useful Lighthouse guides. It will also tell you who the local administrators of the system are. |

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| | |
|---|---|
| **Totals** | Live counts of the current members, supporters, donations, locally recruited members and any other report where "Show total on dashboard" has been checked. Clicking on any of the numbers will open a filtered view of those people |
| **Recent in and out** | Daily counts of members and supporters joining or leaving your organisation, so you can understand what's happening with your membership over time. Clicking on any of the numbers will open a filtered view of those people |
| **Moved recently** | Counts of how many members have moved into, out of, or within your organisation. Clicking on the blue links will take you to a list view with more details on movers. |
| **Day by day** | A graph showing numbers of new members, new supporters and amount donated each day, allowing you to track trends. |
| **Contact History** | A graph showing the total number of members and supporters each day as well as any metrics from other contacts where "show history on dashboard" is checked. |
| **Donation History** | A graph showing total numbers of donations and total amount donated each day and any metrics from other donation reports. |
| **Known issues** | A list of known technical issues with Lighthouse that the team are working to resolve and contact information to report other bugs and glitches |
| **Upcoming features** | A list of exciting new Lighthouse features that will be release in the near future |
| **Recent changes** | A summary of the number of contacts created, updated or moved within your local party today, yesterday and this week. |

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**How to customise your dashboard**

On the dashboard page, you have the ability to completely customise what components are shown and what order they're in. To customise your dashboard, either log in to Lighthouse or click the home icon from anywhere in the system.



**How to expand a dashboard component**

To view a dashboard component in more detail, click the icon with two arrows in the top-left corner of the component. The component will expand to fill the screen. To shrink the component back down and view the rest of your dashboard, click the arrows icon again.
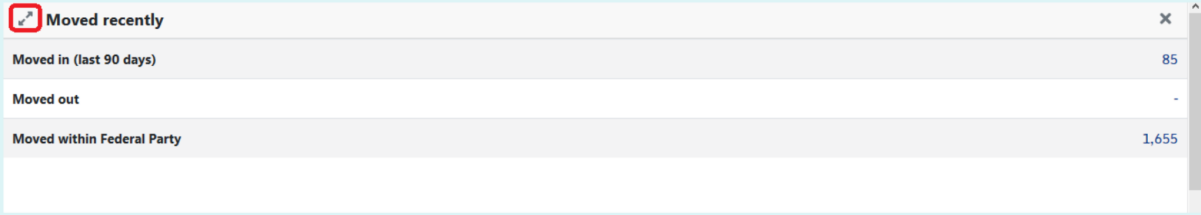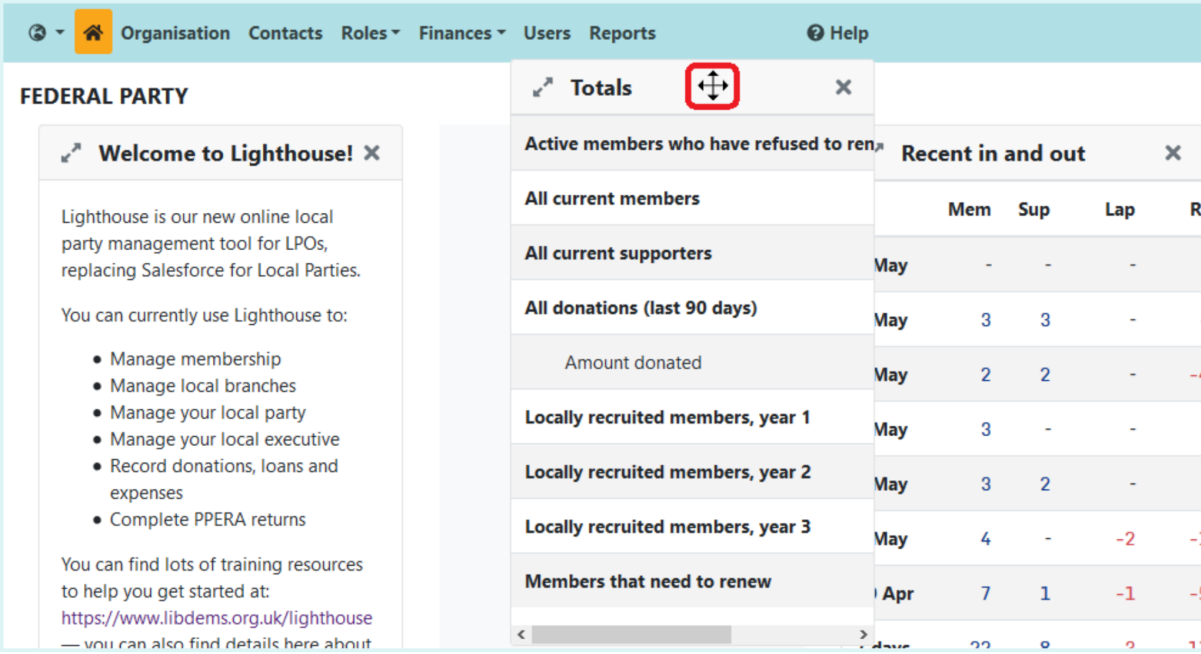
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## How to rearrange your dashboard components

If you move your mouse over the title of a dashboard component, the cursor will change from a single arrow to a set of four arrows pointing away from each other. Once it has changed, click and drag the component around the dashboard. Once you have found a spot to move it to, release the click and the component will drop into its new location.



## How to add or remove dashboard components

By default, all available dashboard components will be visible when you first open your dashboard. To remove a component, click the x icon at the top right of the component, and it will disappear.

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If you have removed dashboard components, you can add them back in by scrolling to the bottom of the page. You will reach an empty component with a "plus" icon in, as shown below. Click on the plus icon and a drop-down menu will appear, showing a list of available components which you can add to the dashboard. Choose one from this list and it will take the place of the empty component.
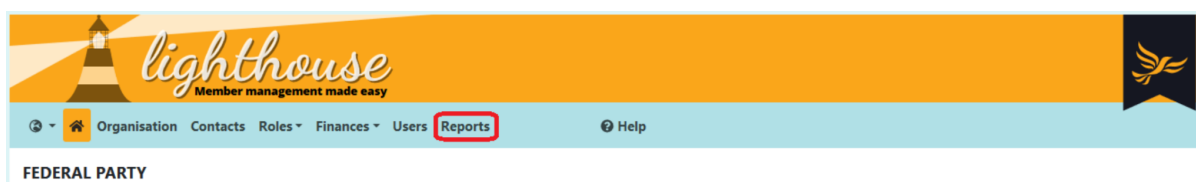


### How to add reports to your dashboard

Please note that this guide covers the steps you need to follow to add data from an existing report to your dashboard. If you need help to create a report, click here.
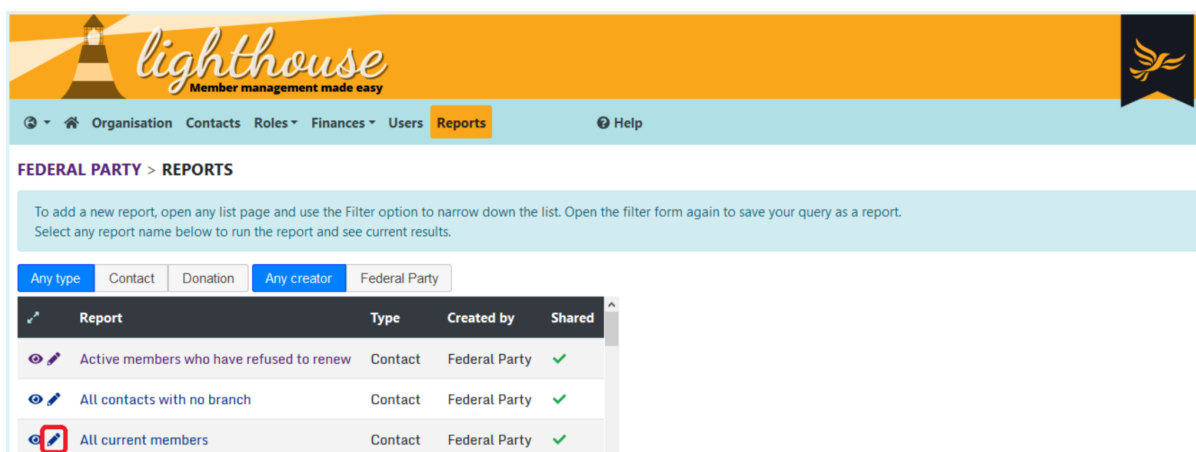
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**Step 1**

Once logged in to Lighthouse, find the reports tab and click on it.



**Step 2**

The Reports page will now load, where you will see a list of all your standard reports as well as your saved custom reports. To get started, click the pencil icon next to a report to edit it.
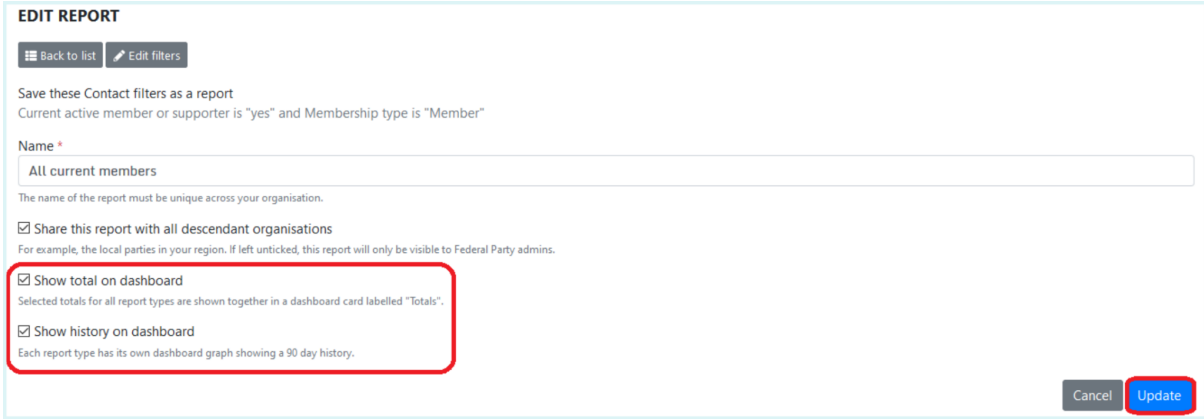


**Step 3**

You will be directed to the Edit page for your chosen report. Here you will see options to edit your report filters and rename your report.

Further down the page, you will see three check-boxes, the second and third of which control whether the report is visible on the dashboard. Check either or both of them depending on how you would like to view the report on your dashboard:

- Show total on dashboard - adds metrics to the "Totals" dashboard component, which updates in real time. For example, you can have live counts of members, supporters and subsections of these groups, such as members who do not belong to a branch or have refused to renew.

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- Show history on dashboard - adds metrics to the "[Type of report] history" graphs on the dashboard. Each report type has its own dashboard graph showing a 90 day history; e.g. "Contact history" and "Donation history". These are useful for seeing trends over time.



Once you are finished, click "Update" at the bottom right of the page. You will then be directed back to the reports page.

## Step 4

Click on the home icon () in the blue menu bar to be taken back to your dashboard. The  information from your chosen report will now be visible in the "Totals" or "[Type of report] history" dashboard components.
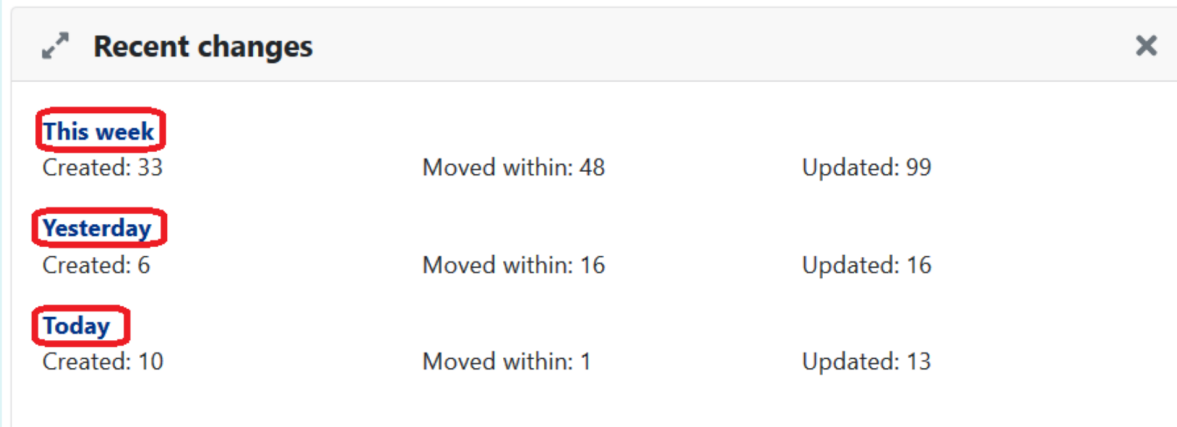
## How to set up email alerts for changes

Lighthouse can also alert you by email when there are changes to records in Lighthouse that you might need to review. To set these email alerts up, you just have to follow the steps below.

## Step 1

In Lighthouse, open up the Dashboard. Scroll down to the "Recent changes" dashboard component, and click on one of the blue links.
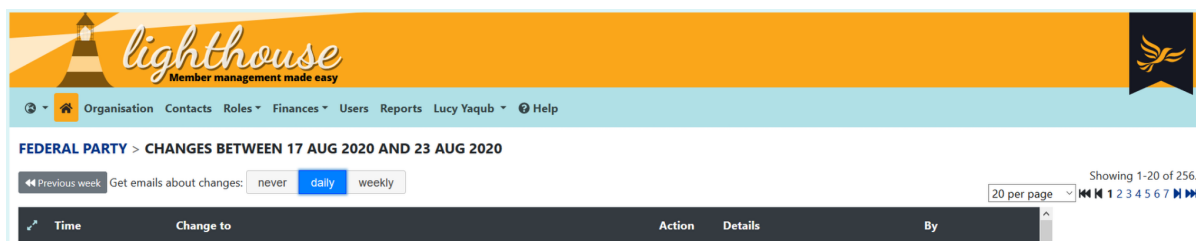
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**Step 2**

The Recent Changes page will now load, where you will see a list of all the recently created and edited contacts within your local party along with a description of any changes.

To set up email alerts, click either "Daily" or "Weekly" above the table of recent changes.



Email alerts contain a summary of the number of contacts created, edited, or who have moved within your local party over the previous day or week. Daily alerts will usually arrive before 6am, whilst weekly ones will arrive each Monday morning.

## Changing your organisation's details

The Organisation tab on Lighthouse contains all of the information that the party knows about your organisation. It's also where we'll get information on how to contact you if a member of the public asks, or uses the In Your Area page on party websites.

It's therefore important to make sure that it's up to date.
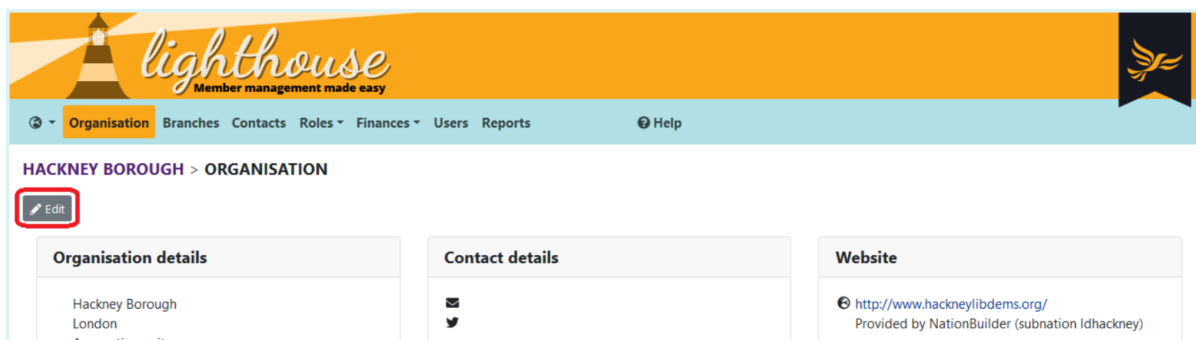
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**Step 1**

Click on the "Organisation" tab in the blue menu at the top.
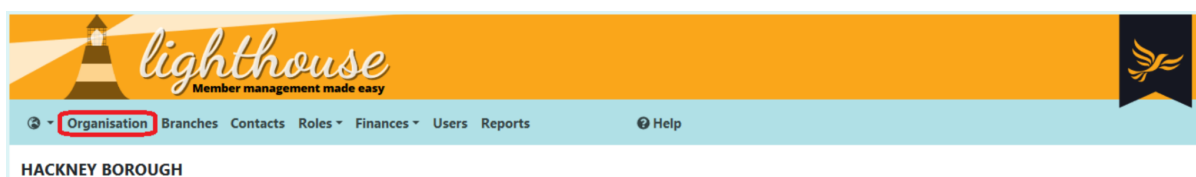


**Step 2**

The Organisation page will load, where you can view details for your local party including its contact information, address, and bank details. To change any of these, click "Edit" at the top-left of the page.



**Step 3**

You will be directed to the Edit page. Type your local party's updated details into the fields that appear on the screen, then click "Update" at the bottom of the page.
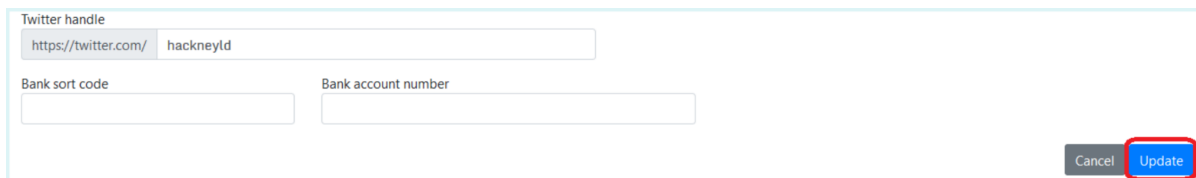


You will then be directed back to the Organisation page, where you can view your local party's updated details.

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# How to manage your account

You can manage your own account at any time by clicking the tab with your name on it. This page allows you to view your own data as well as change your password and set up an authenticator app.

## Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on your name in the blue menu at the top, and a drop-down menu will appear. Click on "My Account".
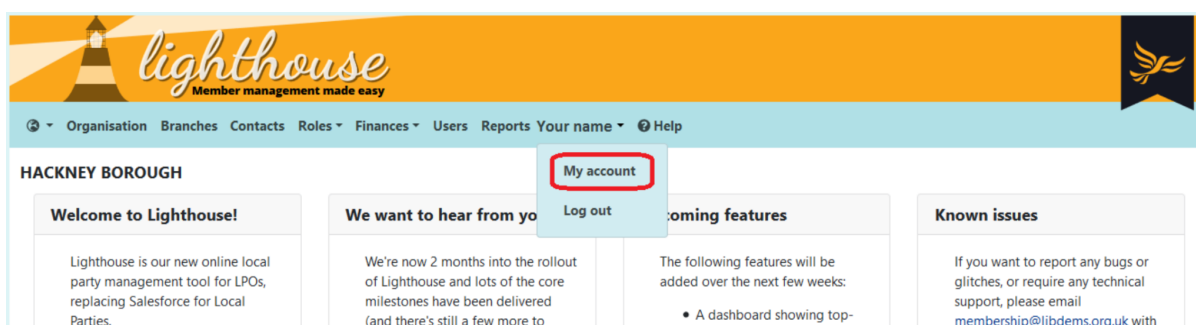


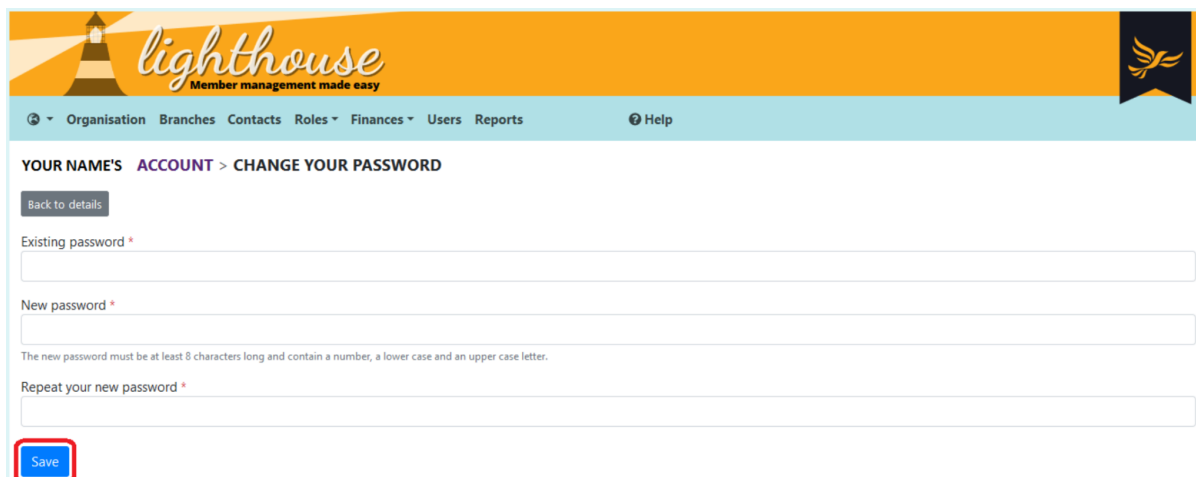## Step 2

You will be directed to the Account page, where you can see all the details associated with your Lighthouse account. To change your password, click the "Change password" button at the top left of the screen.
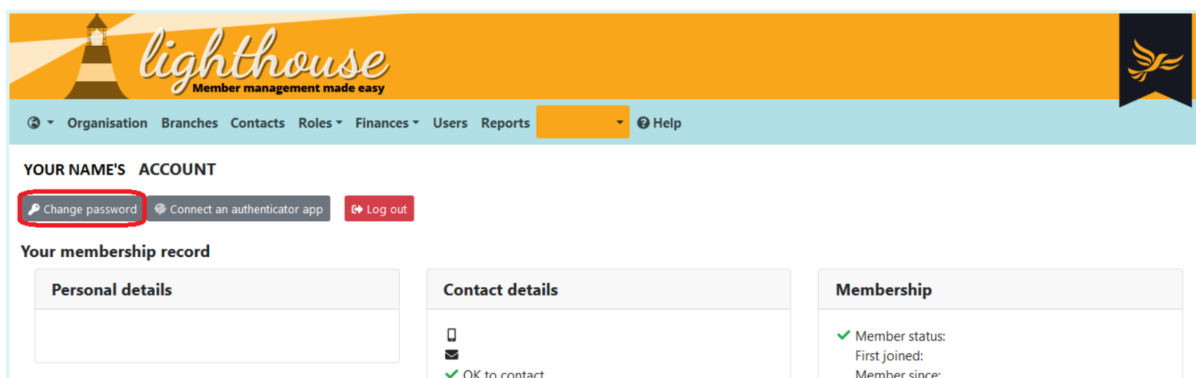


## Step 3

Type in your current password in the first box, then enter your new password in the second. Type it again in the final box to confirm the change, then click "Save".

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Lighthouse will then confirm that your password was successfully changed.

## How to connect an authenticator app

### What is an authenticator app?

When you log into Lighthouse, you will notice that it sends you an email containing a one-time passcode in order to confirm your identity. This is known as two-factor authentication, and helps Lighthouse double-check that you are who you say you are, before allowing you access to the system.

Authenticator apps provide an alternative form of two-factor authentication, and allow you to generate the passcode on your phone instead. If you'd like to know more about two-factor authentication and why it's important, click here.

How does it work?

When you set up an authenticator app with Lighthouse, the website generates a secret key in the form of a QR code. When you scan the code with the app, the key is then saved to your phone.

After you have done this, Lighthouse will ask you to check your authenticator app for a code when you log in. This code will be displayed on your phone for a short time, usually 30 seconds. When you type in the code, Lighthouse knows the right person is trying to sign in.

Where can I get an authenticator app?

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There are lots of authenticator apps to choose from in the Google and Apple app stores. You install them on your phone in the same way you would any other app.

Some examples of authenticator apps include:

- Google Authenticator
- Microsoft Authenticator
- Lastpass Authenticator
- Authy (used in the example below)

Read on to learn how to connect your authenticator app to Lighthouse.

## Step 1

After logging into Lighthouse, you will be directed to the Dashboard page. Click on your name in the blue menu at the top, and a drop-down menu will appear. Click on "My Account".

## Step 2

You will be directed to the Account page, where you can see all the details associated with your Lighthouse account. To connect an authenticator app, click "Connect an authenticator app" at the top left of the page.
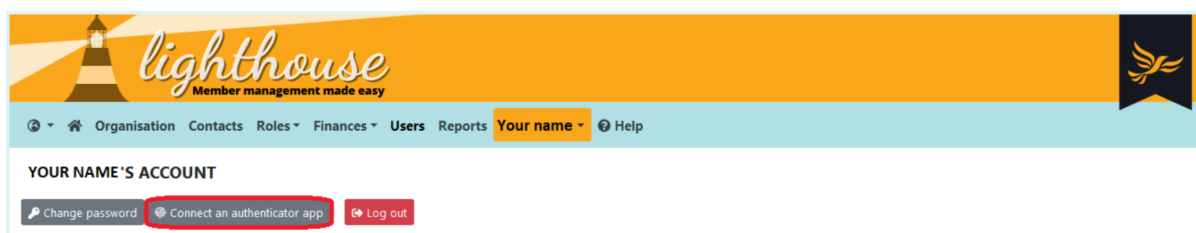


## Step 3

You will be directed to the "Connect an authenticator app" page. Here you will see a large QR code on the screen, as shown below.

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**Step 4**

Open up the authenticator app on your phone, and select "Add account". The app will prompt you to scan the QR code on your computer screen with your phone. You may also be asked to enter a name for the account - just type "Lighthouse".

**Step 5**

The next time you log in to Lighthouse, you will be prompted to type in a code from your authenticator app. Open the app, and navigate to your saved "Lighthouse" account. The code will display on the screen for 30 seconds. Type this code into Lighthouse, and you will be allowed to log in.